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ABSTRACT

Through the years and every passing fad, radio has continued to be a basic fact of life for youth in the United States. The Center on Alcohol Marketing and Youth commissioned Virtual Media Resources (VMR) to audit alcohol radio advertising in 2001 and 2002 and to conduct a case study of alcohol radio advertising in December 2002 and January 2003 to validate the audit findings. In analyzing the results of the audit and case study, the Center finds that the alcohol industry routinely overexposed youth to its radio advertising by placing the ads when and where youth were more likely than adults to hear them. In analyzing the sample from 2001-2002, the Center specifically finds: youth heard more radio ads for beer, "malternatives" and distilled spirits; youth heard substantially less radio advertising for wine; alcohol ads were placed on stations with "youth" formats; alcohol ads were aired when youth listen most; overexposure by brand was extensive; and youth in African-American and Hispanic communities were overexposed. Five appendixes contain research methodology and data tables. (GCP)

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ED 476 053

# *Radio Daze: Alcohol Ads Tune in Underage Youth*

The Center on Alcohol Marketing and Youth

April, 2003

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# RADIO DAZE:

## Alcohol Ads Tune in Underage Youth

## Executive Summary

Through the years and every passing fad, radio has continued to be a basic fact of life for youth in the United States. Consider this: 99.2% of teenagers (defined as ages 12-17) listen to radio every week—a higher percentage than for any other age group—and 80.6% listen to radio every day.[1] Over the course of a week, the average teenager will listen to 13.5 hours of radio.[2] By comparison, he or she will spend 10.6 hours per week watching television, 7.6 hours online, and 3.3 hours reading magazines for pleasure.[3] For African-American and Hispanic teenagers, radio's influence is even more impressive, with average teens listening for 18.25 and 17.75 hours a week respectively.[4]

The Center on Alcohol Marketing and Youth commissioned Virtual Media Resources (VMR) to audit alcohol radio advertising in 2001 and 2002 and to conduct a case study of alcohol radio advertising in December 2002 and January 2003 to validate the audit findings. In analyzing the results of the audit and case study, the Center finds that the alcohol industry routinely overexposed youth[5] to its radio advertising by placing the ads when and where youth were more likely than adults to hear them.

In analyzing the sample from 2001-2002, the Center specifically finds:

- **Youth heard more radio ads for beer, "malternatives" and distilled spirits.** Radio ads for beer, for the so-called low-alcohol refreshers[6] popularly known as "malternatives" or "alcopops," and for distilled spirits were more effectively delivered to youth than to adults.
- **Youth heard substantially less radio advertising for wine.** Ads for wine were overwhelmingly more effectively delivered to adults than to youth, showing how advertisers can target an adult audience without overexposing youth.
- **Alcohol ads were placed on stations with "youth" formats.** Seventy-three percent of the alcohol radio advertising in terms of gross ratings points (GRPs) [7] was on four formats —Rhythmic Contemporary Hit, Pop Contemporary Hit, Urban Contemporary and Alternative—that routinely have a listening audience of 12- to 20-year-olds greater than the proportion of 12- to 20-year-olds in the population of a particular market.
- **Alcohol ads were aired when youth listen most.** Youth were overexposed

[1] Radio Advertising Bureau, *Radio Marketing Guide & Fact Book for Advertisers*, 2002-2003 ed. (New York: Radio Advertising Bureau, 2002), 4-5; Arbitron, Fall 2001.
[2] Radio Advertising Bureau, 8; Arbitron, Fall 2001.
[3] Teenage Research Unlimited, Spring 2002, Wave 39.
[4] Radio Advertising Bureau, 9, 10; Arbitron, Fall 2001.
[5] For this report, unless otherwise noted, youth are defined as persons ages 12-20, and adults are defined as persons ages 21 and over.
[6] Many of the beverages in this category contain 5% alcohol, more than most beers.
[7] GRPs are used to measure the total audience exposed to advertising. For instance, 1,000 GRPs may mean that 50% of an audience heard an ad an average of 20 times over a given period, or that 80% of that audience heard an ad an average of 12.5 times over that period. See Appendix A for how GRPs were calculated.

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April 2, 2003

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to alcohol radio advertising during two of the four "dayparts"[8] monitored. The two dayparts that did not consistently overexpose youth were morning "drive-time" (6 a.m. to 10 a.m., Monday through Friday), a time typically listened to by weekday commuters and office workers, and weekday daytime (10 a.m. to 3 p.m., Monday through Friday).

- **Overexposure by brand was extensive.** Sixty-three of 160 alcohol brands delivered more radio advertising to underage youth than to adults of legal drinking age, and 20 of the 160 brands even delivered more radio advertising to youth than to young adults ages 21-34, an age group the alcohol industry routinely describes as its target audience.[9] Across all brands, 39% of the 87,094 radio ads were more likely to be heard by youth than by adults.
- **Youth in African-American and Hispanic communities were overexposed.** These findings were also seen in the African-American and Hispanic radio audiences. For instance, Hispanic youth heard 34% more beer and ale advertising on radio than Hispanic adults, and as much beer and ale advertising on radio was delivered to African-American youth as to African-American adults.

## Why the Concern

The consequences of underage drinking are real and tragic. Alcohol use plays a substantial role in all three leading causes of death among youth—unintentional injuries (including motor vehicle fatalities and drownings), suicides and homicides.[10] Children who begin drinking before the age of 15 are four times more likely to develop alcohol dependence than those who wait until the age of 21.[11] Underage drinking in the United States is marked by abuse. The vast majority of the alcohol consumed by young people is for the purposes of intoxication: 92% of the alcohol drunk by 12- to 14-year-olds and 96% of the consumption by 15- to 17-year-olds and 18- to 20-year-olds is done when drinkers are having five or more drinks at one time.[12]

The Federal Trade Commission (FTC) has noted that, "while many factors may influence an underage person's drinking decisions, including among other things parents, peers and media, there is reason to believe that advertising also plays a role."[13] Research studies have found that exposure to and liking of alcohol advertisements affect young people's beliefs about drinking, intentions to drink, and actual drinking behavior.[14]

## Center on Alcohol Marketing and Youth www.camy.org

The Center on Alcohol Marketing and Youth at Georgetown University monitors the marketing practices of the alcohol industry to focus attention and action on industry practices that jeopardize the health and safety of America's youth. Reducing high rates of underage alcohol consumption and the suffering caused by alcohol-related injuries and deaths among young people requires using the public health strategies of limiting the access to and the appeal of alcohol to underage persons.

The Center is supported by grants from The Pew Charitable Trusts and the Robert Wood Johnson Foundation to Georgetown University.

## Virtual Media Resources

Virtual Media Resources (VMR) is a media research, planning, market analysis and consulting firm based in Natick, Massachusetts, serving communications organizations and marketers in a wide variety of market segments and media. VMR was established in 1992 to provide an independent research firm serving advertising agencies and marketers, and has grown to service over 100 clients across the U.S. and Canada, in retail, publishing, finance, automotive, public health and other fields.

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[8] A daypart is a segment of a radio station's broadcast day, usually split up on weekdays into time periods of morning (6 a.m. to 10 a.m.), midday (10 a.m. to 3 p.m.), afternoon (3 p.m. to 7 p.m.), and evening (7 p.m. to midnight).

[9] See e.g., Howard Riell, "Half Full or Half Empty?," *Beverage Dynamics*, 112, no. 3 (May 1, 2002): 8; Rebecca Zimoch, "Malternatives: A new brew rides to the rescue," *Grocery Headquarters* 68, no. 4 (April 1, 2002): 83; Sarah Theodore, "Beer's on the up and up," *Beverage Industry* 92, no. 4 (April 1, 2001): 18.

[10] Laura Kann et al, "Youth Risk Behavior Surveillance — United States,1999," *Morbidity and Mortality Weekly Report* 49 (2000): 1-96.

[11] B.F. Grant and D.A. Dawson, "Age at onset of alcohol use and its association with DSM-IV alcohol abuse and dependence: Results from the National Longitudinal Alcohol Epidemiologic Survey," *Journal of Substance Abuse* 9 (1997): 103-110.

[12] Pacific Institute for Research and Evaluation, *Drinking in America: Myths, Realities, and Prevention Policy*, prepared in support of the Office of Juvenile Justice Delinquency Prevention Enforcing the Underage Drinking Laws Program, U.S. Department of Justice (Calverton: Pacific Institute for Research and Evaluation, 2002).

[13] Federal Trade Commission, *Self-Regulation in the Alcohol Industry: A Review of Industry Efforts to Avoid Promoting Alcohol to Underage Consumers* (Washington, D.C.: FTC, 1999), 4.

[14] Joel Grube, "Television alcohol portrayals, alcohol advertising and alcohol expectancies among children and adolescents," in *Effects of the Mass Media on the Use and Abuse of Alcohol*, eds. S.E. Martin and P. Mail (Bethesda: National Institute on Alcohol Abuse and Alcoholism), 105-121; S.E. Martin et al, "Alcohol advertising and youth," *Alcoholism: Clinical and Experimental Research* 26, no. 6 (2002): 900-906.

## About This Report

VMR adhered to industry-standard methodologies in conducting this analysis, using standard industry sources including Media Monitors (MMI), a service that provides advertising occurrence information in 19 radio markets; Arbitron Ratings, a service that provides audience estimates on almost every radio station in approximately 300 markets across the United States; Video Monitoring Services (VMS) and Broadcast Verification Service (BVS), which track radio ads' first occurrences and repeating occurrences, respectively; and Miller Kaplan Associates (MKA), a firm that reports radio advertising expenditures in 32 markets.

Because of the sheer number of radio stations in the United States and the economics of media research, there is no comprehensive monitoring service that provides data—in terms of either audience estimates or ads—for all of them. VMR analyzed a major market sample, drawn by MMI, of alcohol radio ads in 2001 and 2002 that tracked the actual placement of 87,094 ads in 19 leading markets across the nation and integrated these data with audience information from Arbitron to assess who listened to what, when. In addition, VMR then conducted an in-depth analysis of 11,712 ad placements for five alcohol brands in 63 markets from December 15, 2002 to January 31, 2003. This case study confirmed and amplified the findings from the nationwide sample.

MMI, the most comprehensive available source for monitoring radio advertising occurrence data, does not differentiate among ad message types and makes no distinction between product and non-product advertising messages, such as so-called responsibility ads or corporate goodwill ads. Similarly, the most reliable source for radio advertising expenditures, MKA, does not distinguish among message types, but only reports total brand or parent company expenditures within each market. Therefore, all alcohol radio advertising from June 2001-December 2002 for which the "first occurrence" was captured by VMS was analyzed. Of the 788 unique radio commercials for alcohol that were tracked by VMS over this period, there were 20, or 2.5% of the total, that may be classified as non-product advertising. This analysis suggests that the proportion of alcohol ads tracked by MMI that may be non-product ads is minimal. MMI also does not monitor Spanish-language radio stations in its principal monitoring database, and thus this report analyzes only the exposure of Hispanic populations to advertising on English-language as opposed to Spanish-language outlets.

More detailed information about these sources and the methodology used to create this report is included in Appendix A. It is critical to note, however, that these sources reflect a conservative estimate of youth exposure to alcohol advertising on radio; because of limitations on the number of markets sampled, the monitored dayparts, and the frequency of monitoring, the actual scope of alcohol advertising is substantially greater than what is reported here. We estimate that the actual amount of radio advertising for alcohol is approximately eight times what is reported by MMI within the 19 sampled markets.[15]


### Acknowledgements

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Anna Fountas
Former President, Simmons Market Research Bureau and the Traffic Audit Bureau; former Vice President, Arbitron Ratings

Joni Sims
Media Researcher and Consultant; former Partner, Ogilvy & Mather/ Mindshare; former Senior Client Executive, Nielsen Media Research

Michael Siegel, MD, MPH
Associate Professor, Boston University School of Public Health


[15] Within the three markets that monitor until 11 p.m., the proportion of youth GRPs after 7 p.m. is 21%. These markets represent 48% of youth alcohol GRPs within the 19 measured markets. If the GRPs in the remaining markets were adjusted to reflect a comparable proportion of 7 p.m. to 11 p.m. ad occurrences (dividing the total GRPs by .79), and GRPs in all markets were then multiplied by 7 (since only one day per week is sampled by MMI), the resulting total youth 12-20 GRPs for 2001-2002 would be 40,579, or eight times the sampled total. This estimate does not reflect GRPs for any weekday advertising after 11 p.m., which is not monitored by MMI in any market, or for stations not sampled by MMI.



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# I. Introduction

Radio boasts about being the medium that accompanies Americans "24-7"—at home, in our cars, and at work and play.[16] Moreover, for advertisers, radio offers:

- targeted selection of an audience, because station formats appeal to narrow demographics;[17]
- great potential to reach a targeted audience, usually more than 90% of a particular demographic group;[18] and
- substantial repetition of advertising exposure, because radio is an affordable medium with regular listeners who spend a lot of time with their favorite stations.[19]

The alcohol industry has steadily increased its reported spending on radio advertising over the last three years in markets where radio ad spending is tracked, from $176 million in 2000 to $195 million in 2001 to $218 million in 2002.[20] The 2002 spending figures are the reported expenditures in 32 leading markets across the country that represent 47% of the population age 12 and over; 2000 expenditures are from 25 markets representing 39% of the population, and 2001 expenditures are from 27 markets representing 41% of the population.

In the 25 markets measured by MKA from 2000 through 2002, alcohol radio expenditures increased from $175.5 million in 2000 to $194.3 million in 2002, an increase of 10.7%.[21] On network radio, measured by CMR, the industry spent an additional $7.7 million in 2000, $8.6 million in 2001 and $9.2 million in 2002 through September.[22] Network radio is not analyzed in this report because ad occurrence data that can be compared with audience ratings data is generally not available. CMR data were not used to generate any expenditure estimates for this report; spot radio ad spending reported by CMR, which is based on data provided by selected radio advertising representatives, represents only a fraction of actual expenditures.

The beer industry dominates radio alcohol advertising, accounting for 81% of the dollars spent in the 25 markets in 2000, 79% in 2001 and 81% in 2002. Distilled spirits advertising ranks second with 15% of 2002 expenditures, while wine ranks third. Low-alcohol refreshers, while fourth in terms of dollars, had the largest percentage increase for each of the past two years—an indication of the alcohol industry's attempt to create and sustain this market.

**Table 1: Alcohol Spot Radio Spending Trends**

| | 2000 (25 Markets) | | 2001 (27 Markets) | | 2002 (32 Markets) | |
|---|---|---|---|---|---|---|
| **Beverage Category** | **Spending** | **% Total** | **Spending** | **% Total** | **Spending** | **% Total** |
| Beer | 142,318,236 | 81% | 153,049,717 | 79% | 176,288,846 | 81% |
| Distilled Spirits | 22,055,845 | 13% | 31,995,358 | 16% | 31,827,040 | 15% |
| Low-Alcohol Refreshers | 716,740 | 0% | 2,224,918 | 1% | 3,100,962 | 1% |
| Wine | 10,456,742 | 6% | 7,452,031 | 4% | 6,636,951 | 3% |
| Total | 175,547,563 | 100% | 194,722,024 | 100% | 217,853,799 | 100% |
| **Trending** | | | | **Change vs. 2000** | | **Change vs. 2001** |
| 25 Comparable Markets | 175,547,563 | | 193,499,635 | 10.2% | 194,323,227 | 0.4% |
| 27 Comparable Markets | -- | | 194,722,024 | | 202,746,517 | 4.1% |

2000: 25 Markets, 38.7% U.S. population age 12+
2001: 27 Markets, 40.5% U.S. population age 12+
2002: 32 Markets, 46.6% U.S. population age 12+

Source: Miller Kaplan Associates

[16] Mike Mahone and Mary Bennett, introduction to *Radio Marketing Guide & Fact Book for Advertisers*, 2002-2003 ed. (New York: Radio Advertising Bureau, 2002).
[17] Radio Advertising Bureau, 36.
[18] Ibid, 4.
[19] Ibid, 2.
[20] Spot market radio advertising expenditures provided by Miller Kaplan Associates.
[21] Ibid.
[22] Competitive Media Reporting, 2000-2002.

The percentage of youth, ages 12-20, in the total population age 12 and over, varies considerably by radio market across the United States, from 8% to 23%. For all markets surveyed by Arbitron, the weighted average is 15.1%. This is consistent with U.S. Census data that show that youth represent 15.6% of the general population age 12 and over. If a radio ad is placed on a station for which the percentage of youth listening is greater than the percentage of youth in the general population, youth are more likely to hear that ad than adults. In a particular market, this threshold for youth overexposure to alcohol advertising could therefore be as low as 8% or as high as 23%. For the nation on average, this threshold is 15.1%.

## II. Youth Routinely Overexposed

Underage youth, ages 12-20, heard 8% more beer and ale advertising and 12% more low-alcohol refresher advertising than adults 21 and over in the sample of radio ads aired in the 19 markets in 2001 and 2002. The overexposure was even greater for the distilled spirits category, where youth heard 14% more advertising. On the other hand, the wine industry directed its radio advertising to the adult audience, and youth heard 75% less of its advertising in the 2001-2002 sample.

**Table 2: Youth Exposure to Alcohol Radio Advertising**

| Beverage Category* | # Ads | 12-20 GRPs | 21+ GRPs | 12-20 : 21+ Ratio |
|---|---|---|---|---|
| Beer and Ale | 51,190 | 2,689 | 2,481 | 1.08 |
| Distilled Spirits | 9,740 | 560 | 489 | 1.14 |
| Low-Alcohol Refreshers | 6,091 | 309 | 277 | 1.12 |
| Wine | 4,673 | 77 | 314 | 0.25 |

Source: Media Monitors, Arbitron Ratings
*includes only commercials† within these product categories for which the brand was identified by MMI; excludes commercials for hard cider.

†Of the alcoholic beverage commercial occurrences tracked by MMI, 15,124 did not specify the individual brand that was being advertised, but instead only specified the parent company. These occurrences were therefore excluded from brand- and category-level analyses. 1040 ads reported by MMI as Anheuser-Busch Products (i.e. not specific to one brand) were assigned to the Beer & Ale category for purposes of category analysis. We tested the distributions of the mean GRPs for ages 12-20, 21-34, 21+ and 35+ for this group of 15,124 commercials, relative to the balance of commercials, to ensure we did not introduce any bias by excluding these ads from brand- and category-level analyses. For each age group tested (12-20, 21+, 21-34, 35+) the mean value of the distribution was the same for both the excluded and the included samples at a 95% confidence level.

Of the entire sample of 87,094 ads, 39%—33,867—aired on a station for which the percentage of the youth in the listening audience was greater than the percentage of youth in the general population of a particular market. In fact, 14%—or 12,355 ads—were played where the youth listening audience was twice as great as the general youth audience in a particular market. The alcohol industry has its own standard of not placing ads where the underage audience is more than 50%,[23] but even this lax standard was not always met in the sample: 960 ads were placed on programming where the underage audience was greater than 50%. (A summary of radio ads that overexposed youth in 2001-2002, whether defined by the percentage of youth in the audience, or by the percentage of youth in the audience relative to the percentage of youth in the local market population, is provided in Appendix B.)

In terms of ads by brands, 63 of the 160 brands overexposed youth to their radio advertising, and 20 of the 160 brands delivered more radio advertising to the youth audience than to young adults ages 21-34. (Tables of youth and adult GRPs by advertised brand for the total population, the Hispanic population and the African-American population are provided in Appendix C.) Among the 20 brands that actually delivered more radio advertising to youth than to young adults were Remy Martin Cognac, Bacardi Rum, Courvoisier Cognac, Colt 45 Malt Liquor, and Hennessy Cognac. The impact of hip-hop artists and their songs on the marketing of cognacs and other alcoholic beverages has received considerable media attention. A spokesman for Allied Domecq Wine and Spirits told *The New York Times* in September 2002 that "Pass the Courvoisier Part Two" by Busta Rhymes increased sales of that liquor by 4.5% in the first quarter of 2002 and "into double digits in recent months."[24]

An analysis of the top 10 beer and ale brands in terms of radio advertising delivered to the youth audience shows that eight overexposed youth relative to adults. The overexposure ranged from 47% more advertising delivered to youth than to adults by Amstel Light to 3% more advertising delivered to youth than to adults by Michelob.

[23] Beer Institute, "Advertising & Marketing Guide Code, " <http://www.beerinstitute.org/admarkcode.htm> (19 Nov 2002); Distilled Spirits Council of the United States, "Code of Good Practice for Distilled Spirits Advertising and Marketing," <http://discus.org/industry/code/code.htm> (19 Nov 2002, 1998.

[24] Lynette Holloway, "Hip-Hip Sales Pop: Pass the Courvoisier and Count the Cash," *New York Times*, Monday, 2 September 2002, sec. C1.



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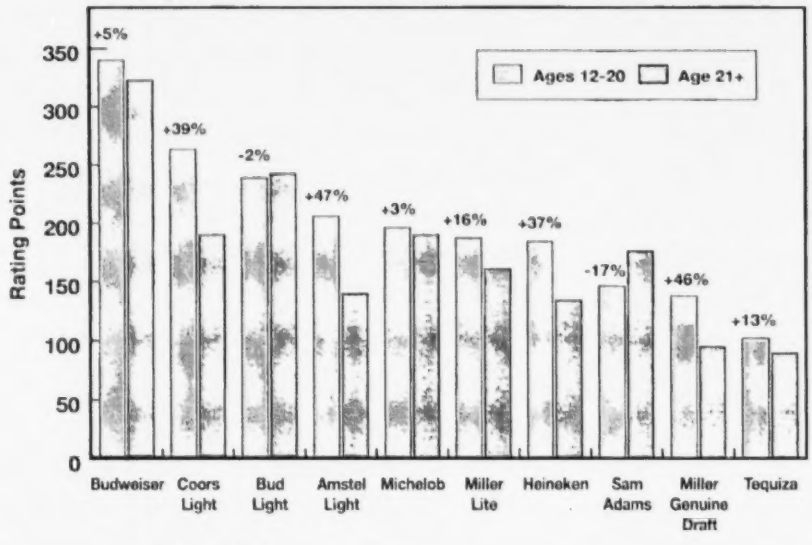
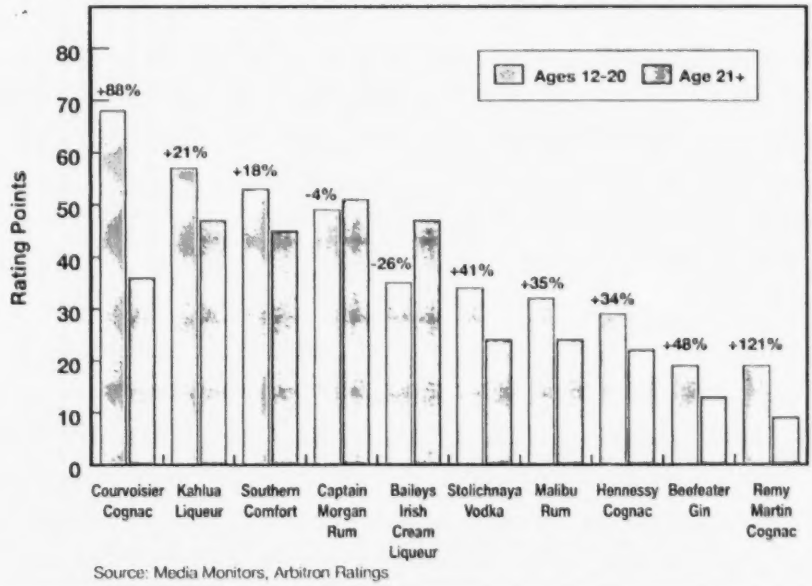
**Figure A: Beer Brands with Most Youth Advertising**




Source: Media Monitors, Arbitron Ratings

For distilled spirits, the analysis is similar. Of the top 10 brands in terms of radio advertising delivered to youth in 2001-2002, eight overexposed youth relative to adults. Overexposure among the distilled spirits brands ranged from Remy Martin Cognac's 121% to Southern Comfort's 18%.

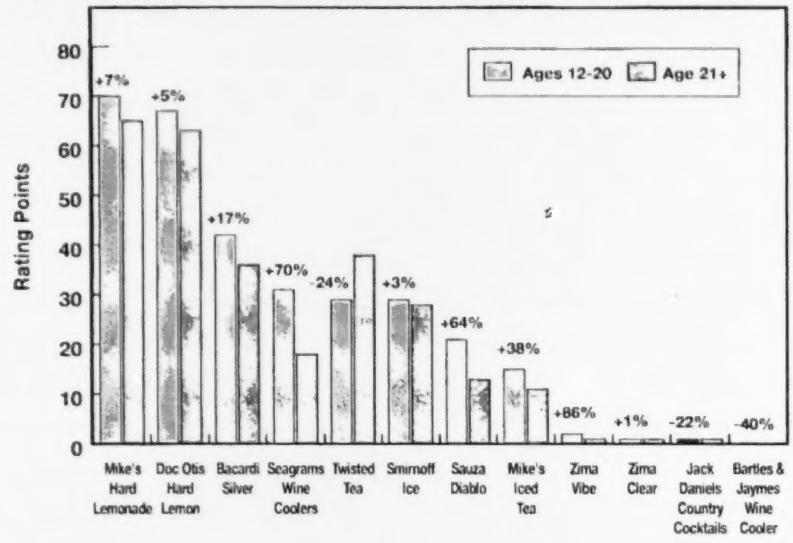
**Figure B: Distilled Spirits Brands with Most Youth Advertising**




Source: Media Monitors, Arbitron Ratings

The industry category of low-alcohol refreshers includes the alcoholic beverages that are popularly known as "malternatives" or "alcopops," and, as the spending analysis indicates, they have had significant increases in advertising between 2000 and 2002. This ad spending was only on 12 brands, and four of the brands had little radio advertising at all. Of the 12, however, nine of them overexposed youth to their radio ads. The overexposure ranged from 86% for Zima Vibe to 1% for Zima Clear.

**Figure C: Low-Alcohol Refresher Brands with Most Youth Advertising**




Source: Media Monitors, Arbitron Ratings

A final analysis demonstrates how the alcohol industry's overexposure of youth to its radio advertising stretches from coast to coast. In nine of the 19 markets in the 2001-2002 sample, youth were overexposed. This overexposure ranged from 45% more alcohol radio advertising delivered to youth in Miami-Ft. Lauderdale to 5% more in Honolulu. Even when youth were not overexposed to the radio advertising, the volume of alcohol radio advertising delivered to youth compared to adults was significant. For instance, in San Antonio, New York, Boston, Indianapolis, Denver-Boulder, Detroit and Chicago youth heard on average more than four radio alcohol ads for every five heard by adults.

**Table 3: Alcohol Radio Advertising by Market 2001-2002**

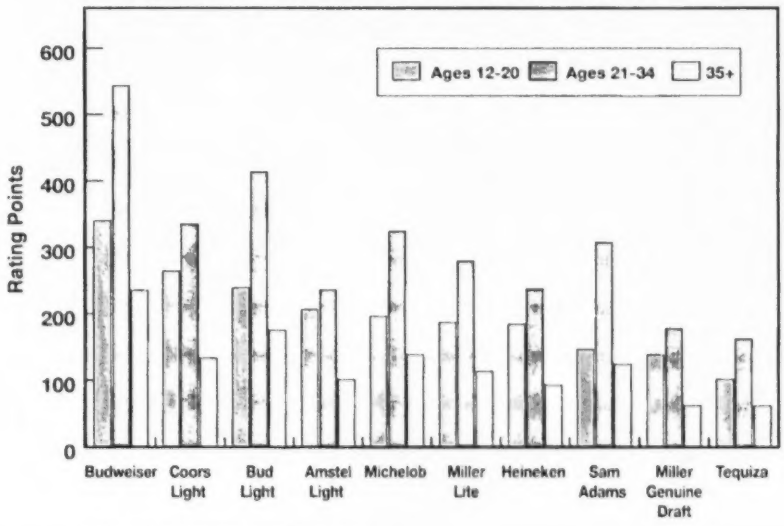
| Market | 12-20 GRPs | 21+ GRPs | 12-20 : 21+ Ratio |
|---|---|---|---|
| Miami-Ft. Lauderdale | 3,216 | 2,211 | 1.45 |
| Washington, DC | 2,681 | 2,090 | 1.28 |
| Dallas-Ft. Worth | 4,412 | 3,669 | 1.20 |
| San Francisco | 4,044 | 3,406 | 1.19 |
| Los Angeles | 6,164 | 5,609 | 1.10 |
| Atlanta | 3,550 | 3,318 | 1.07 |
| Seattle-Tacoma | 3,148 | 2,954 | 1.07 |
| Houston-Galveston | 2,676 | 2,529 | 1.06 |
| Honolulu | 3,053 | 2,919 | 1.05 |
| San Antonio | 3,300 | 3,392 | 0.97 |
| New York | 6,444 | 6,800 | 0.95 |
| Boston | 3,414 | 3,607 | 0.95 |
| Indianapolis | 3,823 | 4,074 | 0.94 |
| Denver-Boulder | 2,548 | 2,992 | 0.85 |
| Detroit | 2,194 | 2,642 | 0.83 |
| Chicago | 4,636 | 5,665 | 0.82 |
| Nashville | 967 | 1,338 | 0.72 |
| Philadelphia | 1,886 | 3,048 | 0.62 |
| Cincinnati | 1,502 | 2,441 | 0.62 |

Source: Media Monitors, Arbitron Ratings

## These Aren't Your Mom and Dad's Radio Ads

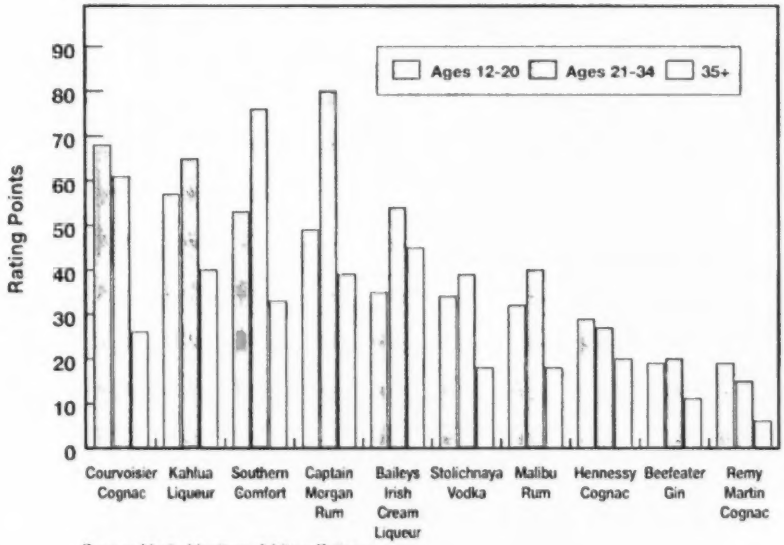
If it is a truism that parents don't listen to the same music as their children, it is likewise true that the alcohol industry isn't placing its radio ads where parents will hear them. The alcohol industry often defends its advertising practices by pointing to the 21-34 age group as its target audience.[25] In fact, looking at the top 10 brands in the different alcohol categories—beer and ale, distilled spirits, and low-alcohol refreshers—in terms of radio advertising delivered to the youth market does show that 21- to 34-year-olds are routinely exposed to more alcohol advertising than youth. At the same time, youth are routinely overexposed, when compared to adults age 35 and over, by an even greater percentage. In other words, the alcohol advertising on radio routinely spills over to the underage audience more than to the older adult audience of legal age.

**Figure D: Beer Brands with Most Youth Advertising**




Source: Media Monitors, Arbitron Ratings

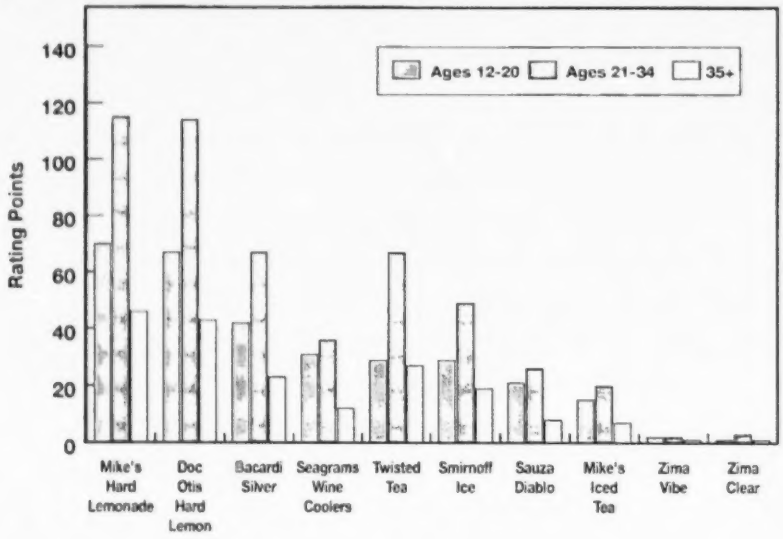
**Figure E: Distilled Spirits Brands with Most Youth Advertising**




Source: Media Monitors, Arbitron Ratings

[25] See footnote 9.

**Figure F: Low-Alcohol Refresher Brands with Most Youth Advertising**




Source: Media Monitors, Arbitron Ratings

## Alcohol Radio Ads Where and When Youth Listen

Four radio formats routinely have a 50% or higher percentage of youth listeners[26] than the percentage of youth in the general population: Rhythmic Contemporary Hit, Pop Contemporary Hit, Urban Contemporary and Alternative.[27] For instance, youth on average make up 27% of the listening audience for Rhythmic Contemporary Hit formats; this percentage is almost double that of youth in the general listening audience. This means that on Rhythmic Contemporary Hit formats, the youth audience is highly concentrated, and ads placed on that format are more likely to be heard by youth than by adults.

After reviewing the placement of alcohol ads on radio by format, the Center's analysis finds that in the 2001-2002 sample 73% of the advertising in terms of GRPs directed to youth was on these four formats. In comparison, 53% of the advertising directed to young adults 21-34 was placed on these four formats. Again, this shows a selection of formats by the alcohol industry that results in its radio advertising spilling down to the underage audience, and in this instance also shows a substantially more effective delivery of the advertising to the underage audience.

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[26] Media Monitors, Arbitron Ratings.

[27] *Rhythmic Contemporary Hit* (CHR-rhythmic) stations play hip-hop, rap and dance songs, rather than rock and alternative (played on Popular Contemporary Hit or CHR-pop), although there is some cross-over. Playlists consist of new cutting-edge music, current hits and popular hits of the last 6 to 12 months. The target audience is people 15 to 30 years of age, and artists played on these stations include 50 Cent, Ja Rule, Jennifer Lopez, LL Cool J, Aaliyah, Nelly, and Tupac. *Pop Contemporary Hit* is also referred to as Contemporary Hit (CHR-top 40). The basic elements of this format are the same as Rhythmic Contemporary Hit (above), but Pop Contemporary Hits favors rock and alternative songs. Artists include Jennifer Lopez, Justin Timberlake, B2K, P. Diddy, and Eminem. *Urban Contemporary* is usually listed simply as "urban" and is also known as R&B (rhythm and blues). The Urban Contemporary musical genre reflects a large number of African-American music recording artists with such music as rap, hip-hop, house, soul and new artists. Urban formats are generally aimed at younger audiences. Artists include 50 Cent, Aaliyah, Jennifer Lopez, Ja Rule, Dru Hill, Nelly, and Snoop Dogg. *Alternative* stations are generally non-commercial, college-run outlets that play cutting-edge music not typically found on other stations; they may include some punk, industrial, and heavy metal music in the mix. Artists include Queens of the Stone Age, Red Hot Chili Peppers, Saliva, Audioslave, and Foo Fighters. See e.g., 10,000 Watts U.S. Radio and TV Directory, "Frequently Asked Questions," <http://www.100000watts.com/FAQ.html>, (20 Feb 2003); TVRadioWorld, "Radio Formats," <http://www.tvradioworld.com/directory/Radio_Formats/>, (20 Feb 2003); Radio and Records, "Formats," < http://www.radioandrecords.com/>, (20 Feb 2003).



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**Table 4: Alcohol Advertising Exposure on Youth Radio Formats**

| Format | Youth Ages 12-20 % Composition | 2001-2002 GRPs 12-20 GRPs | 21-34 GRPs | 21+ GRPs | 12-20 : 21+ Ratio |
|---|---|---|---|---|---|
| Alternative | 21.6% | 1,321 | 1,816 | 831 | 1.59 |
| Urban Contemporary | 24.4% | 688 | 686 | 369 | 1.87 |
| Pop Contemporary Hit Radio | 30.5% | 559 | 438 | 221 | 2.53 |
| Rhythmic Contemporary Hit | 27.0% | 514 | 517 | 242 | 2.13 |
| All Formats | | 4,223 | 6,515 | 4,278 | 0.99 |
| Youth Formats as % of total GRPs | | 73% | 53% | 39% | |

Source: Media Monitors, Arbitron Ratings

MMI provides information on four dayparts during the week: 6 a.m. to 10 a.m. Monday through Friday; 10 a.m. to 3 p.m. Monday through Friday; 3 p.m. to 7 p.m. Monday through Friday; and 7 p.m. to midnight Monday through Friday.[28] On average for 2001 and 2002, alcohol advertising on two of the four dayparts tracked by MMI overexposed youth. The dayparts when youth were not overexposed were the weekday morning drive time of 6 a.m. to 10 a.m., a time that typically delivers advertising exposure to the working and commuting audiences, and weekday daytime from 10 a.m. to 3 p.m. However, alcohol advertising during the summer months did overexpose youth during the 10 a.m. to 3 p.m. daypart, Monday through Friday. Youth listening levels during the summer ratings periods are elevated relative to other seasons.[29]

**Table 5: Alcohol Advertising Exposure by Daypart**

| Daypart | 2001-2002 Total Youth 12-20 GRPs * | % | Adult 21+ GRPs * | % | 12-20 : 21+ Ratio | Summer 2001/Summer 2002 Youth 12-20 GRPs * | % | Adult 21+ GRPs * | % | 12-20 : 21+ Ratio |
|---|---|---|---|---|---|---|---|---|---|---|
| M-F 6:00AM - 10:00AM | 1,263 | 21% | 1,436 | 23% | 0.88 | 387 | 19% | 424 | 22% | 0.91 |
| M-F 10:00AM - 3:00PM | 1,607 | 27% | 2,169 | 35% | 0.74 | 719 | 36% | 698 | 37% | 1.03 |
| M-F 3:00PM - 7:00PM | 1,863 | 31% | 1,843 | 30% | 1.01 | 551 | 28% | 541 | 29% | 1.02 |
| M-F 7:00PM - 12:00M ** | 1,283 | 21% | 791 | 13% | 1.62 | 344 | 17% | 231 | 12% | 1.49 |
| Market Subtotal | 6,016 | | 6,238 | | 0.96 | 2,002 | | 1,893 | | 1.06 |

* market subset - includes only markets monitored 6 a.m. to 11 p.m. M-F
** standard daypart is 7 p.m. to 12 midnight; Media Monitors measures until 11 p.m.
Source: Media Monitors, Arbitron Ratings

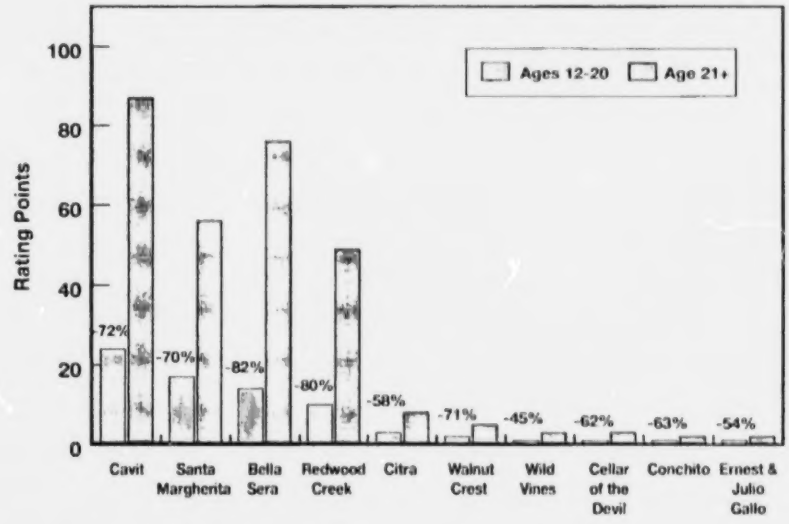
To establish a context for daypart findings based on the limited hours during which MMI samples its markets, a daypart comparison between MMI for 2001-2002 and the separate BVS case study for December 2002-January 2003 was performed. This analysis, shown as Appendix D, suggests that a considerable amount of alcohol advertising occurs on weekdays after 7:00 p.m. that is not reported in the 16 MMI markets that are only monitored until 7:00 p.m. In the analysis, 24% of weekday youth ages 12-20 rating points in the BVS case study occurred between 7 p.m. and midnight, while 21% of youth ages 12-20 rating points in the three MMI markets occurred between 7 p.m. and 11 p.m. The BVS data therefore confirms the conclusions based on the three-market sample from MMI in which weekday evening ad occurrences are reported.

[28] MMI provides monitoring from 6 a.m. to 7 p.m. in 16 markets representing 52% of youth GRPs in this report, and from 6 a.m. to 11 p.m. in three markets representing 48% of youth GRPs.
[29] Arbitron.

## Wine Sings a Different Tune

The analysis of radio advertising for wine presents a striking contrast to advertising for beer and ale, low-alcohol refreshers and distilled spirits. Of the 10 wine brands with the most advertising that does reach the youth audience, all 10 direct substantially more advertising to adults. Youth hear 82% **less** advertising for Bella Sera wine than adults, for instance.

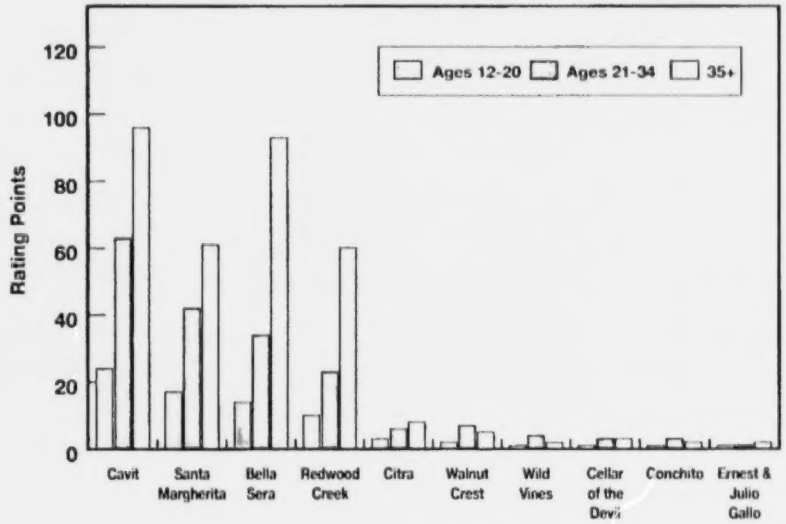
**Figure G: Wine Brands with Most Youth Advertising**




Source: Media Monitors, Arbitron Ratings

When radio advertising for wine is analyzed using the 12-20, 21-34, and 35+ demographic split, the analysis is even more striking, with the 35+ audience being substantially exposed to more radio advertising for wine than the 12-20 age group—the exact opposite finding from that for radio advertising for beer and ale, low-alcohol refreshers and distilled spirits.

**Figure H: Wine Brands with Most Youth Advertising**




Source: Media Monitors, Arbitron Ratings

## III. Youth Overexposure: A Case Study

To cross-check and validate the findings from the 2001-2002 sample, a case study was conducted from December 15, 2002 to January 31, 2003, using VMS and BVS. (See Appendix A for further description of these services.) These services provide for a more comprehensive tracking of ad placements, including the monitoring of weekend dayparts. This analysis is based on monitoring the placement of ads for five brands in 63 markets and captured 11,712 radio ads over the six-week period.

The findings were consistent with the 2001-2002 sample:

- All five brands overexposed youth to their advertising, ranging from youth hearing 387% more advertising than adults for Bacardi to youth hearing 24% more advertising than adults for Coors Light.
- Sixty-one percent of the ads were more likely to be heard by youth than by adults.
- "Youth" formats received most of the radio alcohol advertising directed to youth.[30]
- In every daypart, except for 10 a.m. to 3 p.m. Monday through Friday, youth were overexposed to radio alcohol advertising.

To increase the odds of capturing a large number of occurrences, brands were selected on the basis of new radio creative airing as monitored by VMS. All occurrences of those ads in 63 markets monitored by BVS were then tracked and matched with audience data from Arbitron. Details of the brand selection and monitoring methodology are included in Appendix E. The five brands are:

- Bacardi, 200 ads
- Coors Light, 6,646 ads
- Heineken, 1,146 ads
- Jack Daniels Original Hard Cola, 72 ads
- Southern Comfort, 3,648 ads

Not only did each of the five brands overexpose youth to their advertising, but one brand—Bacardi—also exposed youth to more advertising than the 21-34 age group, by 99%.

**Table 6: BVS Sample: Youth (12-20) vs. Adult (21+) Exposure**

| Brand | 12-20 GRPs | 21+ GRPs | 12-20 : 21+ Ratio |
|---|---|---|---|
| Bacardi | 9.2 | 1.9 | 4.87 |
| Jack Daniels Original Hard Cola | 0.2 | 0.1 | 2.84 |
| Heineken | 29.9 | 16.4 | 1.82 |
| Southern Comfort | 48.3 | 31.1 | 1.55 |
| Coors Light | 104.8 | 84.5 | 1.24 |

Note: GRPs are rounded and were calculated based on the universe of 63 markets
Source: BVS, Arbitron Ratings

**Table 7: BVS Sample: Youth (12-20) vs. Young Adult (21-34) Exposure**

| Brand | 12-20 GRPs | 21-34 GRPs | 12-20 : 21-34 Ratio |
|---|---|---|---|
| Bacardi | 9.2 | 4.6 | 1.99 |
| Jack Daniels Original Hard Cola | 0.2 | 0.2 | 0.93 |
| Heineken | 29.9 | 32.3 | 0.93 |
| Southern Comfort | 48.3 | 54.5 | 0.89 |
| Coors Light | 104.8 | 160.4 | 0.65 |

Note: GRPs are rounded and were calculated based on the universe of 63 markets
Source: BVS, Arbitron Ratings

[30] Youth formats are identified as those with an audience composition for youth ages 12-20 that is at least 50% greater than the percentage of youth in the population, based on Arbitron ratings.

As in the 2001-2002 sample, the radio alcohol advertising monitored from December 2002 through January 2003 was routinely placed on the four formats where youth listenership is the greatest: Rhythmic Contemporary Hit, Pop Contemporary Hit, Urban Contemporary and Alternative. Almost 70% of the radio alcohol advertising directed to youth by these five brands was placed on these formats, and the youth overexposure ranged from 197% on Urban Contemporary to 74% on the Alternative format.

**Table 8: BVS Sample: Alcohol Advertising Exposure on Youth Radio Formats**

| Format | Youth Ages 12-20 % Composition | 12-20 GRPs | 21-34 GRPs | 21+ GRPs | 12-20 : 21+ Ratio |
|---|---|---|---|---|---|
| Urban Contemporary | 34.8% | 11 | 8 | 4 | 2.97 |
| Rhythmic Contemporary Hit | 29.0% | 47 | 47 | 21 | 2.28 |
| Pop Contemporary Hit Radi | 28.8% | 21 | 18 | 9 | 2.26 |
| Alternative | 23.7% | 56 | 77 | 32 | 1.74 |
| All Formats | | 192 | 252 | 134 | 1.58 |
| Youth Formats as % of total GRPs | | 70% | 59% | 49% | |

Source: BVS, Arbitron Ratings

Youth overexposure by daypart in the ads audited from December 2002 through January 2003 ranged from 137% during the 7 p.m. to midnight Monday through Friday time slot to 49% for the 6 a.m. to 10 a.m. Monday through Friday time slot.

**Table 9: BVS Sample: Alcohol Advertising Exposure by Daypart**

| Daypart | Youth ages 12-20 % Composition | 12-20 GRPs | 21+ GRPs | 12-20 : 21+ Ratio |
|---|---|---|---|---|
| M-F 6:00AM - 10:00AM | 18.4% | 24 | 16 | 1.49 |
| M-F 10:00AM - 3:00PM | 12.5% | 38 | 43 | 0.88 |
| M-F 3:00PM - 7:00PM | 21.3% | 54 | 36 | 1.50 |
| M-F 7:00PM - 12:00M | 29.0% | 37 | 16 | 2.37 |
| S-S 6:00AM - 12:00M | 23.7% | 40 | 23 | 1.69 |

Source: BVS, Arbitron Ratings

## IV. African-American and Hispanic Communities

The 2001-2002 sample of 87,094 alcohol radio ads monitored by MMI was also analyzed to determine what, if any, overexposure of youth relative to adults occurred in the African-American and Hispanic communities. There has been widespread concern in both communities that the alcohol industry uses specific marketing tactics to encourage alcohol consumption in their communities, from the commercialization of Cinco de Mayo to the use of Juneteenth and Black History Month as alcohol marketing opportunities.

Arbitron Ratings provides estimates of the African-American and Hispanic radio audiences in a subset of its measured radio markets. To account for potential instability of the Arbitron audience data, a one-year average was used for both the African-American and the Hispanic audiences. (See Appendix A for a further discussion of this methodology.) In the case of the African-American community, 83,939 of the 87,094 ads had an African-American reported audience in the 2001-2002 sample; in the case of the Hispanic community, 69,368 of the 87,094 ads had a reported Hispanic audience.

The findings for the African-American and Hispanic communities tracked many of the general findings of youth overexposure for the 2001-2002 sample. For instance, Hispanic youth heard 34% more beer and ale advertising than Hispanic adults, and as much beer and ale advertising was delivered to African-American youth as to African-American adults. For radio advertising for distilled spirits, Hispanic youth were overexposed by 40%, while African-American youth heard four distilled spirits ads for every five that reached African-American adults.

For low-alcohol refreshers, both Hispanic and African-American youth were overexposed---by 24% and 10%, respectively.

Again, radio advertising for wine was substantially more effectively delivered to the adult audiences: Hispanic youth heard 64% less wine advertising than Hispanic adults, and African-American youth heard 77% less wine advertising than African-American adults.

**Table 10: Hispanic Youth vs. Hispanic Adult Radio Exposure**

| Beverage Category | GRPs Ages 12-20 | GRPs Age 21+ | 12-20 : 21+ Ratio |
|---|---|---|---|
| Beer and Ale | 2,659 | 1,989 | 1.34 |
| Distilled Spirits | 609 | 435 | 1.40 |
| Low-Alcohol Refreshers | 329 | 265 | 1.24 |
| Wine | 70 | 198 | 0.36 |

Source: Media Monitors, Arbitron Ratings

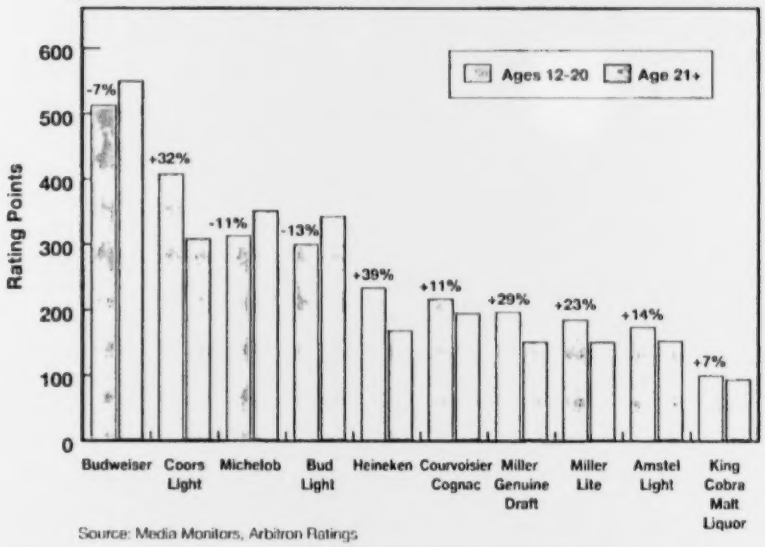
**Table 11: African-American Youth vs. African-American Adult Radio Exposure**

| Beverage Category | GRPs Ages 12-20 | GRPs Age 21+ | 12-20 : 21+ Ratio |
|---|---|---|---|
| Beer and Ale | 2,983 | 2,972 | 1.00 |
| Distilled Spirits | 859 | 1,075 | 0.80 |
| Low-Alcohol Refreshers | 201 | 182 | 1.10 |
| Wine | 68 | 293 | 0.23 |

Source: Media Monitors, Arbitron Ratings

For the African-American community, 44 of the 160 brands overexposed African-American youth to their advertising compared to African-American adults. Seven of the 10 brands with the most advertising delivered to the African-American youth audience overexposed African-American youth. The overexposure ranged from 39% for Heineken to 7% for King Cobra Malt Liquor.

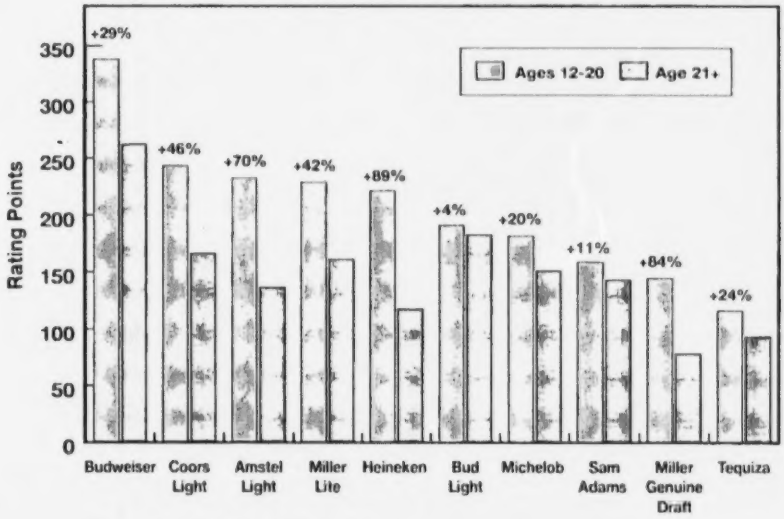
**Figure I: Brands with Most African-American Youth Advertising**




Source: Media Monitors, Arbitron Ratings

For the Hispanic community, 70 of the 160 brands overexposed Hispanic youth to their advertising compared to Hispanic adults. All 10 of the brands with the most advertising delivered to the Hispanic youth overexposed them. The overexposure ranged from 89% for Heineken to 4% for Bud Light.

**Figure J: Brands with Most Hispanic Youth Advertising**




Source: Media Monitors, Arbitron Ratings

## Conclusion

Advertising in the measured media of magazines, television and radio is not done in isolation. Magazine, television and radio advertising are used to reinforce and complement the impact of one another.

In previous reports, the Center has documented the pervasive and systematic overexposure of youth to alcohol advertising in magazines in 2001[31] and the laxity of the alcohol industry's guidelines in limiting youth exposure to alcohol advertising on television in 2001.[32] The Center's analysis of radio advertising in 2001-2002 again demonstrates a pervasive and systematic overexposure of youth to alcohol advertising in a medium that, like magazines, allows for the selection of particular audiences because of station formats and daypart listening habits.

What emerges from the three reports is a panorama of a media environment that saturates youth with alcohol advertising.

The industry's guidelines allow advertising where the underage audience is not in the majority, and thus provide no protection to youth from the overexposure to alcohol advertising as documented in the Center's reports.

Oversight at the federal level is non-existent. The Federal Trade Commission released its review of alcohol advertising practices in 1999 and made several recommendations, but has done little publicly to follow up. The industry's public threshold for ad placement remains at 50%, although some companies say they try not to place ads where the underage audience is more than 30%—a threshold that still allows for youth overexposure. Public health advocacy groups such as Mothers Against Drunk Driving and the American Medical Association have advocated, respectively, for 10% and 15% thresholds for placing alcohol ads. The FTC also called on the industry to provide for independent third-party monitoring of its advertising practices, and that has been resisted by

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[31] Center on Alcohol Marketing and Youth, *Overexposed: Youth a Target of Alcohol Advertising in Magazines*, (Washington, DC: Center on Alcohol Marketing and Youth, 2002). Available at <http://camy.org/research/files/overexposed0902.pdf>.

[32] Center on Alcohol Marketing and Youth, *Television: Alcohol's Vast Adland*, (Washington, D.C.: Center on Alcohol Marketing and Youth, 2002). Available at <http://camy.org/research/files/television1202.pdf>.

the industry. One company, Coors, has entered into a monitoring arrangement with the Better Business Bureau because it could not convince other beer companies to join it in establishing a third-party monitoring system.[33] The Department of Health and Human Services lacks critical public health data about underage drinking, such as the patterns of consumption for various ages by types and brands of alcohol. The advertising exposure data being collected and analyzed by the Center is basic public health surveillance that has been lacking.

While communities across the land and the nation as a whole have worked hard to ensure responsibility and accountability in limiting underage youth access to alcohol, it appears that no one is at home when it comes to responsibility and accountability in limiting the appeal of alcohol to underage youth.

[33] Bart Alexander, Director of Public Affairs, Coors Brewing Company, personal communication with Anna Haas, August 2, 2002.

# Appendix A

## A. Sources

### Arbitron

Arbitron Ratings provides audience estimates on almost every radio station in approximately 300 radio markets across the U.S. Arbitron reports both "average quarter hour" and "cumulative" ratings; cumulative ratings, which represent the net number of listeners tuning to a particular station, may be calculated for a standard period of time, such as a daypart or week, or for a custom period of time such as one hour. For this analysis, VMR used average quarter-hour ratings for standard dayparts in order to best provide the audience ratings associated with particular commercials.

Arbitron reports Hispanic and African-American audiences in a subset of its total market list.

### Media Monitors

Media Monitors provides radio advertising occurrence monitoring in 19 local radio markets for its English-language monitoring service, using a sampling process in which one random weekday per week is monitored on a selected list of stations in each market. All advertising is reported and assigned to a particular advertiser or brand, but it is not associated with a specific radio commercial. Advertising is not reported at the exact time, but instead for the hour in which it occurs; this hour is then mapped to standard weekday dayparts. Media Monitors surveys on weekdays between 6 a.m. and 7 p.m. in 16 markets representing approximately half of total teen alcohol advertising exposure, and from 6 a.m. to 11 p.m. in the remaining three markets.

### Video Monitoring Services

Video Monitoring Services (VMS) monitors various media, including radio, for advertising and programming. Two hundred and nine radio stations in 25 markets are tracked; markets are tracked between 24 hours and 100 hours per week. Radio advertising for alcohol is provided on a "first occurrence" basis, with specific details as to the market, station, time, advertiser, brand, description and a copy of the actual creative.

### Broadcast Verification Service

Broadcast Verification Service (BVS) monitors encoded advertising on TV and radio. More than 900 stations in 103 markets are continuously tracked for occurrences. Alcohol advertising provided by VMS is encoded by BVS; occurrences are captured and reported with specific market, station, time, and advertising information.

### Miller Kaplan Associates

Miller Kaplan Associates (MKA) reports radio advertising expenditures in 32 markets. Virtually all commercial stations in each market participate and provide actual expenditure data under restrictions that prohibit release of any information specific to a particular station. The expenditure information is generally provided at the company level, rather than the individual brand. MKA therefore provides company- and market-level radio advertising reports in 32 markets that are the most accurate measure of alcohol category radio advertising, without providing detailed brand- or station-level data.

## B. Process

Daypart coding

Using the complete database of all alcohol radio advertising occurrence data for the years 2001 and 2002, VMR coded each occurrence to its corresponding daypart:

**Media Monitors (2001-2002)**

| Hours | Daypart | Total Occurrences |
|---|---|---|
| M-F 6 a.m. to 10 a.m. | Weekday Morning Drive | 15,452 |
| M-F 10 a.m. to 3 p.m. | Weekday Mid-Day | 30,710 |
| M-F 3 p.m. to 7 p.m. | Weekday Afternoon Drive | 32,590 |
| M-F 7 p.m. to 11 p.m. | Weekday Evening | 8,342 |

**Broadcast Verification Service (December 15, 2002-January 31, 2003)**

| Hours | Daypart | Total Occurrences |
|---|---|---|
| M-F 6 a.m. to 10 a.m. | Weekday Morning Drive | 700 |
| M-F 10 a.m. to 3 p.m. | Weekday Mid-Day | 2,378 |
| M-F 3 p.m. to 7 p.m. | Weekday Afternoon Drive | 2,619 |
| M-F 7 p.m to midnight | Weekday Evening | 2,998 |
| S/S 6 a.m. to midnight | Weekend | 3,017 |

Ratings append and audience calculation

For each daypart, market and station, VMR applied the average quarter-hour audience as reported by Arbitron for the corresponding survey period. VMR calculated:

- audience composition for youth ages 12-20 as a percentage of all persons age 12+
- index of youth ages 12-20 audience composition relative to each market
- audience composition of Hispanic youth ages 12-20 as a percentage of all persons age 12+ and of the total Hispanic population (in Arbitron markets where Hispanic audiences are reported)
- index of Hispanic youth ages 12-20 audience composition relative to each market (in Arbitron markets where Hispanic audiences are reported)
- audience composition of African-American youth ages 12-20 as a percentage of all persons age 12+ and of the total African-American population (in Arbitron markets where African-American audiences are reported)
- index of African-American youth ages 12-20 audience composition relative to each market (in Arbitron markets where African-American audiences are reported)
- GRPs (Gross Rating Points) for:
  - Ages 12-20 (total, Hispanic, African-American)
  - Ages 21-34 (total, Hispanic, African-American)
  - Age 35+ (total, Hispanic, African-American)
  - Age 12+ (total, Hispanic, African-American)
  - Age 21+ (total, Hispanic, African-American)

In addition, exposures were aggregated and audience composition and GRPs were calculated by advertiser, station, and format within markets and across all markets in which an advertiser has reported radio advertising.

GRPs

GRPs (Gross Rating Points) are the sum of ratings of a set of ad occurrences, including multiple exposures. GRPs are the most common measure of media weight. For example, 200 GRPs may represent the number of exposures required to reach 50% of a given population an average of four times, or 80% of the same population an average of 2.5 times.

GRPs are population- and market-specific, and must be calculated for each demographic audience and each market or group of markets. For the totals in this report based on MMI occurrences, GRPs were calculated for the 19 market total.

GRP Ratio

VMR calculated a GRP ratio to measure exposure of youth relative to adults. This ratio divides the youth 12-20 GRPs for an individual ad occurrence (or for an aggregate by brand, market, daypart or product category) by the equivalent adult 21+ GRPs. A ratio of greater than 1 indicates that youth were exposed out of proportion to adults. A ratio of 2 indicates that youth were exposed at double the rate of adults.

The GRP ratio (and all GRP calculations) is based on actual market compositions, for which the percentage of youth ages 12-20 will vary.

Ratings surveys

For this analysis the Center on Alcohol Marketing and Youth licensed Arbitron ratings data beginning with the Winter 2001 survey and continuing to current surveys.

Except for Hispanic and African-American ratings (as noted below), for advertising occurrences reported in Media Monitors,

VMR used the corresponding survey period in Arbitron for 2001 to provide a reporting of what was purchased and the audience that was reached. For Fall 2002 advertising occurrences in Media Monitors, VMR used the Fall 2001 survey period in Arbitron for 2001 based on the availability of Arbitron Ratings data.

In cases where a particular station was not reported (as in the case of a station call letter change, or the case of a market that is measured with fewer than four surveys per year), VMR searched subsequent surveys until a match was found. If no match was found, VMR searched preceding surveys until a match was found.

Hispanic and African-American Ratings

Because of reported sampling and reporting variations for Hispanic and African-American audiences, VMR calculated a one-year average for these audiences and their corresponding populations to provide stable estimates.[34]

For all occurrences in 2001, VMR used an average of all surveys in 2001. For occurrences in 2002, VMR used the contemporaneous 2002 survey and the preceding surveys of up to one year. The list of markets measured by Arbitron for both Hispanic and African-American audiences is a subset of the total list of measured markets, and it varies by survey. Most averages are of either two surveys (Fall and Spring) or all four surveys.

[34] The Arbitron Radio Market Report Reference Guide, updated February 2002, demonstrates how multibook averages are a standard feature of Arbitron reports. Multibook averages are widely used throughout the advertising industry to provide more stable radio ratings estimates than may otherwise be reported. Every reporting system for Arbitron Ratings provides the capability for multibook averages. On February 3, 2003, *Mediaweek* cited Arbitron's planned changes to Hispanic reporting to address swings in their Hispanic audience estimates. Katy Bachman, "3 Years of Spanish Lessons," *Mediaweek*, 3 February, 2003.

# Appendix B

**Table 1: Radio Ads that Overexpose Youth**

| | 2001-2002 Sample | |
|---|---|---|
| | **Total Ads** | **% of Total** |
| **Total Alcohol Radio Ads** | 87,094 | 100% |
| **Overexposure Defined by Index *** | | |
| Youth Audience Index >100 | 33,867 | 38.9% |
| Youth Audience Index >200 | 12,355 | 14.2% |
| Youth Audience Index >300 | 1,795 | 2.1% |
| **Overexposure Defined by % Youth Composition** | | |
| >30% Ages 12-20 Composition | 11,481 | 13.2% |
| >40% Ages 12-20 Composition | 3,795 | 4.4% |
| >50% Ages 12-20 Composition | 960 | 1.1% |

* Index = Youth 12-20 composition relative to the composition of youth ages 12-20 in each market

Source: Media Monitors, Arbitron Ratings

# Appendix C – Table 1

## Youth (12-20) vs. Adult (21+) Overexposure by Brand

| Brand | Total GRPs 12-20 | Total GRPs 21+ | 12-20 : 21+ GRP Ratio |
|---|---|---|---|
| Otra Beer | 3.9 | 0.6 | 7.03 |
| Asahi Beer | 14.7 | 3.3 | 4.42 |
| Lancaire Wine | 0.1 | 0.0 | 4.34 |
| Bacardi | 14.6 | 4.3 | 3.43 |
| Natural Light Beer | 0.3 | 0.1 | 3.16 |
| Midori Liqueur | 12.4 | 4.3 | 2.90 |
| Old Milwaukee Beer | 0.2 | 0.1 | 2.89 |
| Tequila Rose Liqueur | 0.7 | 0.3 | 2.88 |
| Beaulieu Vineyard Wines | 0.0 | 0.0 | 2.42 |
| Schlitz Malt Liquor | 2.0 | 0.8 | 2.41 |
| Das Kornet Vanilla Liqueur | 0.5 | 0.2 | 2.27 |
| Remy Martin Cognac | 19.4 | 8.8 | 2.21 |
| Grant Burge Wine | 0.1 | 0.0 | 2.04 |
| Riunite Wine | 0.1 | 0.1 | 1.98 |
| Courvoiser Cognac | 67.5 | 36.0 | 1.88 |
| King Cobra Malt Liquor | 30.9 | 16.5 | 1.88 |
| Zima Vibe Malt Beverage | 1.9 | 1.0 | 1.86 |
| Colt 45 Malt Liquor | 22.7 | 12.6 | 1.80 |
| Seagrams Wine Coolers | 31.4 | 18.5 | 1.70 |
| Jagermeister Liqueur | 1.4 | 0.8 | 1.64 |
| Sauza Diablo | 21.4 | 13.0 | 1.64 |
| Rolling Rock Beer | 38.4 | 24.1 | 1.60 |
| Red Bull Malt Liquor | 7.2 | 4.7 | 1.55 |
| Stolichnaya Citrona | 11.1 | 7.4 | 1.50 |
| Beefeater Gin | 19.5 | 13.2 | 1.48 |
| Amstel Light Beer | 205.6 | 139.7 | 1.47 |
| Miller Genuine Draft | 138.5 | 94.6 | 1.46 |
| J&B Scotch | 15.2 | 10.6 | 1.43 |
| Stolichnaya Vodka | 33.9 | 24.0 | 1.41 |
| Coors Light Beer | 263.7 | 190.1 | 1.39 |
| Cutty Sark Scotch | 0.2 | 0.2 | 1.38 |
| Mike's Iced Tea Malt Beverage | 15.3 | 11.1 | 1.38 |
| Heineken Beer | 184.2 | 134.2 | 1.37 |
| Jose Cuervo Tequila | 9.0 | 6.6 | 1.36 |
| Malibu Rum | 32.5 | 24.1 | 1.35 |
| Hennessy Cognac | 28.9 | 21.5 | 1.34 |
| Olde English 800 | 17.1 | 12.8 | 1.33 |
| Lone Star Beer | 4.1 | 3.4 | 1.22 |
| Icehouse Ice Beer | 16.5 | 13.6 | 1.22 |
| Kahlua Liqueur | 56.5 | 46.8 | 1.21 |
| TGI Fridays Frozen Drinks | 10.0 | 8.3 | 1.20 |
| Bud Ice Draft Beer | 17.7 | 14.8 | 1.19 |
| Dos Equis Beer | 27.7 | 23.3 | 1.19 |
| Sauza Tequila | 11.6 | 9.8 | 1.18 |
| Southern Comfort | 53.0 | 45.0 | 1.18 |
| Kocani Beer | 1.5 | 1.3 | 1.17 |
| Bacardi Silver Malt Liquor | 42.0 | 35.9 | 1.17 |
| Miller Lite | 187.0 | 160.6 | 1.16 |
| Caffreys Irish Ale | 7.8 | 6.8 | 1.15 |
| Red Stripe Beer | 7.9 | 6.9 | 1.15 |
| Sam Adams Light Beer | 9.7 | 8.5 | 1.14 |
| High Gravity Lager | 0.1 | 0.1 | 1.13 |
| Tequiza Beer | 101.9 | 90.5 | 1.13 |
| Hurricane Malt Liquor | 13.9 | 12.6 | 1.10 |
| Mike's Hard Lemonade Malt Beverage | 70.2 | 65.4 | 1.07 |
| Budweiser Beer | 340.2 | 322.9 | 1.05 |
| Doc Otis Hard Lemon Malt Beverage | 66.7 | 63.4 | 1.05 |
| Pilsener Urquell Beer | 0.8 | 0.8 | 1.04 |
| Michelob Beer | 196.3 | 190.3 | 1.03 |
| B&B Cognac | 1.7 | 1.7 | 1.03 |
| Smirnoff Ice Malt Beverage | 28.9 | 28.0 | 1.03 |
| Jack Daniels Whiskey | 1.3 | 1.3 | 1.02 |
| Zima Clear Malt Beverage | 1.4 | 1.4 | 1.01 |
| Dewars 12 Scotch Whiskey | 0.2 | 0.2 | 1.00 |
| Korbel Champagne | 0.4 | 0.4 | 1.00 |
| Bud Light Beer | 238.7 | 243.2 | 0.98 |
| Guinness Beer | 37.8 | 38.6 | 0.98 |
| Steinlager Beer | 0.4 | 0.4 | 0.98 |
| Miller High Life | 5.9 | 6.1 | 0.96 |
| Captain Morgan Rum | 48.8 | 50.9 | 0.96 |
| Coors Beer | 21.9 | 23.0 | 0.95 |
| Guinness Stout | 25.7 | 27.2 | 0.95 |
| Tanqueray Gin | 8.3 | 9.0 | 0.93 |
| Hard Core Hard Cider | 2.3 | 2.5 | 0.92 |
| Killians Variety Beers | 25.9 | 28.3 | 0.91 |
| Harp Lager | 19.5 | 21.4 | 0.91 |
| Fosters Beer | 28.4 | 31.4 | 0.91 |
| Bacardi Breezers Rum Coolers | 0.1 | 0.1 | 0.90 |
| Special Export Beer | 18.2 | 20.4 | 0.89 |
| OP Vodka | 1.4 | 1.6 | 0.89 |
| Pabst Blue Ribbon Beer | 0.5 | 0.6 | 0.86 |
| Martell Cognac | 12.2 | 14.5 | 0.84 |
| Tuaca Liqueur | 1.9 | 2.3 | 0.84 |
| Sam Adams Beer | 145.6 | 176.4 | 0.83 |
| Lowenbrau Beer | 0.5 | 0.6 | 0.82 |
| Bass Ale | 57.2 | 70.1 | 0.82 |
| Becks Beer | 47.6 | 59.4 | 0.80 |
| Jack Daniels Country Cocktails | 0.9 | 1.2 | 0.78 |
| Cordon Negro Brut | 0.7 | 0.8 | 0.78 |
| Molson Beers | 27.4 | 35.1 | 0.78 |
| Twisted Tea Malt Beverage | 29.1 | 38.3 | 0.76 |
| Seagrams 7 Crown Whiskey | 2.4 | 3.1 | 0.76 |
| Seagrams Gin | 9.0 | 11.9 | 0.76 |
| Killarneys Red Lager | 40.8 | 54.3 | 0.75 |
| Schnappes Liquors | 0.5 | 0.7 | 0.75 |
| Baileys Irish Cream Liqueur | 35.4 | 47.5 | 0.74 |
| Romana Sambuca Liqueur | 1.7 | 2.3 | 0.74 |
| Rutherford Hill Wine | 0.3 | 0.4 | 0.74 |
| Labatt Beer | 18.7 | 25.9 | 0.72 |
| Chivas Regal Scotch | 17.3 | 24.3 | 0.71 |
| Cerveza Mexicali | 0.0 | 0.1 | 0.69 |
| Vermeer Dutch Chocolate Cream Liquor | 2.3 | 3.4 | 0.68 |
| Magners Cider | 11.6 | 17.8 | 0.65 |
| Moosehead Beer | 3.2 | 5.1 | 0.61 |
| Becks Light Beer | 8.6 | 14.1 | 0.61 |
| Berghoff Beer | 2.6 | 4.4 | 0.60 |
| Bartles & Jaymes Wine Cooler | 0.1 | 0.1 | 0.60 |
| Southern Twist Liqueur | 0.3 | 0.4 | 0.60 |
| Cointreau Liqueur | 0.1 | 0.1 | 0.56 |
| Freixenet Wine | 0.0 | 0.1 | 0.55 |
| Michael's Wines | 0.0 | 0.0 | 0.55 |
| Wild Vines Wine | 1.5 | 2.7 | 0.55 |
| Crown Beer | 10.9 | 21.6 | 0.50 |
| Pucker Schnappes | 5.8 | 11.6 | 0.50 |
| Martini & Rossi Wine | 0.0 | 0.0 | 0.50 |
| Barton Beers | 0.7 | 1.5 | 0.46 |
| Busch Beer | 18.6 | 40.1 | 0.46 |
| Ernest & Julio Gallo Wine | 0.7 | 1.5 | 0.46 |
| Arbor Mist Wine | 0.6 | 1.3 | 0.45 |
| Sam Adams Octoberfest Seasonal Brew | 0.1 | 0.1 | 0.45 |
| Seagrams VO Canadian Whiskey | 4.2 | 9.5 | 0.44 |
| Absolut Vodka | 5.9 | 13.5 | 0.43 |
| Alize Liqueur | 0.4 | 1.0 | 0.42 |
| Citra Wine | 3.3 | 7.8 | 0.42 |
| Warsteiner Beer | 0.1 | 0.3 | 0.39 |
| Cellar of the Devil Wine | 1.1 | 2.8 | 0.38 |
| Sutter Home Wine | 0.0 | 0.1 | 0.38 |
| Conchito Wines | 0.8 | 2.1 | 0.37 |
| Santa Margherita Wine | 16.9 | 55.5 | 0.30 |
| Titos Handmade Vodka | 0.1 | 0.3 | 0.30 |
| Walnut Crest Wine | 1.6 | 5.4 | 0.29 |
| Cavit Wine | 23.8 | 86.6 | 0.28 |
| Wild Turkey Bourbon Whiskey | 0.1 | 0.3 | 0.26 |
| Korbel Brandy | 0.0 | 0.0 | 0.23 |
| Monthaven Coastal Wine | 0.1 | 0.4 | 0.22 |
| Redwood Creek Wine | 9.8 | 49.1 | 0.20 |
| Rubitso Wine | 0.2 | 0.9 | 0.20 |
| Redhook Ale | 0.7 | 3.7 | 0.19 |
| Bella Sera Wine | 13.6 | 76.2 | 0.18 |
| Johnnie Walker Black Label Scotch | 0.2 | 1.4 | 0.18 |
| Old Style Beer | 2.3 | 13.9 | 0.17 |
| Johnnie Walker Scotch Whiskey | 0.4 | 2.2 | 0.17 |
| Woodbridge Wine | 0.0 | 0.2 | 0.17 |
| Red Tail Ale | 0.0 | 0.3 | 0.16 |
| McPherson Wine | 0.2 | 1.4 | 0.15 |
| Manischewitz Wine | 0.0 | 0.1 | 0.13 |
| Mezza Corona Wines | 0.0 | 0.2 | 0.12 |
| Snowman Ale | 0.0 | 0.0 | 0.12 |
| Early Times Bourbon Whiskey | 0.1 | 1.1 | 0.11 |
| Bolla Wine | 0.2 | 2.2 | 0.10 |
| Baron Herzog Wine | 0.4 | 3.9 | 0.10 |
| Moet & Chandon Champagne | 0.0 | 0.5 | 0.08 |
| Keystone Beer | 0.0 | 0.2 | 0.08 |
| Grey Goose Vodka | 0.1 | 1.0 | 0.07 |
| Bouchard Wine | 0.1 | 1.2 | 0.06 |
| Rotari Italian Sparkling Wines | 0.0 | 0.1 | 0.06 |
| Veuve Clicquot Champagne | 0.4 | 8.5 | 0.05 |
| Fetran Kosher Wine | 0.0 | 0.9 | 0.04 |
| San Giuseppe Wines | 0.0 | 0.0 | 0.04 |
| Bunrati Meade | 0.0 | 0.1 | 0.01 |
| No Product Specified | 591.4 | 718.9 | 0.82 |
| **Total** | **4,223.2** | **4,277.8** | **0.99** |

Source: Media Monitors, Arbitron Ratings





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# Appendix C – Table 2

## Hispanic Youth (12-20) vs. Hispanic Adult (21+) Overexposure by Brand

| Brand | GRPs 12-20 | GRPs 21+ | 12-20 : 21+ GRP Ratio |
|---|---|---|---|
| Otra Beer | 12.1 | 1.9 | 6.41 |
| Old Milwaukee Beer | 0.1 | 0.0 | 5.14 |
| Bacardi | 23.7 | 4.7 | 4.99 |
| Asahi Beer | 40.9 | 8.8 | 4.67 |
| Natural Light Beer | 0.7 | 0.2 | 4.18 |
| Schlitz Malt Liquor | 1.8 | 0.5 | 3.86 |
| Remy Martin Cognac | 21.3 | 5.6 | 3.81 |
| Lancers Wine | 0.6 | 0.2 | 3.32 |
| Midori Liqueur | 25.2 | 7.7 | 3.28 |
| Tequila Rose Liqueur | 1.1 | 0.4 | 3.07 |
| High Gravity Lager | 0.0 | 0.0 | 2.96 |
| Courvoisier Cognac | 69.6 | 24.0 | 2.89 |
| King Cobra Malt Liquor | 24.5 | 9.3 | 2.62 |
| Colt 45 Malt Liquor | 28.9 | 11.3 | 2.57 |
| Das Komet Vanilla Liqueur | 0.2 | 0.1 | 2.35 |
| Zima Vibe Malt Beverage | 1.4 | 0.6 | 2.31 |
| Sauza Diablo | 36.0 | 15.7 | 2.30 |
| Zima Clear Malt Beverage | 0.3 | 0.1 | 2.28 |
| J&B Scotch | 24.9 | 11.4 | 2.19 |
| Pabst Blue Ribbon Beer | 0.0 | 0.0 | 2.08 |
| Stolichnaya Vodka | 49.4 | 24.2 | 2.04 |
| Jagermeister Liqueur | 2.2 | 1.1 | 2.02 |
| Rolling Rock Beer | 32.9 | 17.1 | 1.93 |
| Heineken Beer | 221.5 | 117.5 | 1.89 |
| Miller Genuine Draft | 144.6 | 78.5 | 1.84 |
| Beefeater Gin | 26.5 | 14.4 | 1.84 |
| Red Bull Malt Liquor | 4.9 | 2.7 | 1.83 |
| Mike's Iced Tea Malt Beverage | 22.3 | 12.3 | 1.82 |
| Amstel Light Beer | 232.6 | 136.8 | 1.70 |
| Hennessy Cognac | 31.8 | 18.7 | 1.70 |
| Icehouse Ice Beer | 8.0 | 4.8 | 1.68 |
| Sam Adams Octoberfest Seasonal Brew | 0.0 | 0.0 | 1.68 |
| Seagrams Wine Coolers | 32.1 | 20.6 | 1.56 |
| Coors Light Beer | 243.3 | 166.2 | 1.46 |
| Sam Adams Light Beer | 19.0 | 13.0 | 1.46 |
| Malibu Rum | 36.0 | 25.0 | 1.44 |
| Kahlua Liqueur | 69.5 | 48.5 | 1.43 |
| Dos Equis Beer | 42.4 | 29.9 | 1.42 |
| Miller Lite | 228.9 | 161.5 | 1.42 |
| Olde English 800 | 17.1 | 12.1 | 1.42 |
| OP Vodka | 1.8 | 1.3 | 1.38 |
| Sauza Tequila | 18.0 | 13.3 | 1.35 |
| Stolichnaya Citrona | 10.9 | 8.1 | 1.34 |
| Hurricane Malt Liquor | 9.9 | 7.5 | 1.33 |
| TGI Fridays Frozen Drinks | 10.1 | 7.6 | 1.32 |
| Mike's Hard Lemonade Malt Beverage | 77.8 | 59.4 | 1.31 |
| B&B Cognac | 0.6 | 0.5 | 1.31 |
| Budweiser Beer | 338.0 | 262.4 | 1.29 |
| Tequiza Beer | 116.0 | 93.4 | 1.24 |
| Arbor Mist Wine | 0.8 | 0.7 | 1.22 |
| Michelob Beer | 181.9 | 151.1 | 1.20 |
| Guinness Stout | 27.0 | 22.5 | 1.20 |
| Guinness Beer | 38.8 | 33.0 | 1.18 |
| Martell Cognac | 6.3 | 5.5 | 1.15 |
| Bacardi Silver Malt Liquor | 35.7 | 31.2 | 1.14 |
| Korbel Champagne | 0.3 | 0.2 | 1.14 |
| Doc Otis Hard Lemon Malt Beverage | 77.5 | 69.3 | 1.12 |
| Southern Comfort | 48.2 | 43.2 | 1.11 |
| Sam Adams Beer | 159.0 | 143.3 | 1.11 |
| Becks Beer | 36.8 | 33.3 | 1.11 |
| Seagrams Gin | 6.8 | 6.3 | 1.09 |
| Bass Ale | 61.6 | 57.6 | 1.07 |
| Harp Lager | 14.2 | 13.5 | 1.05 |
| Special Export Beer | 11.4 | 10.8 | 1.05 |
| Bud Light Beer | 191.1 | 182.9 | 1.04 |
| Cutty Sark Scotch | 0.1 | 0.1 | 1.04 |
| Lone Star Beer | 9.8 | 9.4 | 1.04 |
| Killarneys Red Lager | 42.2 | 40.6 | 1.04 |
| Red Stripe Beer | 10.1 | 9.8 | 1.04 |
| Smirnoff Ice Malt Beverage | 25.0 | 24.4 | 1.03 |
| Bacardi Breezers Rum Coolers | 0.1 | 0.1 | 1.00 |
| Killians Variety Beers | 20.0 | 20.0 | 1.00 |
| Fosters Beer | 24.4 | 24.7 | 0.99 |
| Tanqueray Gin | 7.3 | 7.5 | 0.98 |
| Dewars 12 Scotch Whiskey | 0.2 | 0.2 | 0.94 |
| Miller High Life | 5.0 | 5.3 | 0.94 |
| Grant Burge Wine | 0.1 | 0.1 | 0.93 |
| Jose Cuervo Tequila | 4.5 | 4.9 | 0.92 |
| Captain Morgan Rum | 40.6 | 44.2 | 0.92 |
| Tuaca Liqueur | 1.3 | 1.4 | 0.90 |
| Bud Ice Draft Beer | 2.3 | 2.6 | 0.89 |
| Kocani Beer | 0.1 | 0.1 | 0.88 |
| Lowenbrau Beer | 0.1 | 0.1 | 0.87 |
| Chivas Regal Scotch | 29.5 | 34.0 | 0.87 |
| Michael's Wines | 0.0 | 0.0 | 0.86 |
| Molson Beers | 13.2 | 15.5 | 0.86 |
| Schnappes Liquors | 0.6 | 0.7 | 0.85 |
| Coors Beer | 9.8 | 11.7 | 0.84 |
| Caffreys Irish Ale | 4.0 | 4.9 | 0.83 |
| Hard Core Hard Cider | 1.0 | 1.2 | 0.83 |
| Cordon Negro Brut | 1.3 | 1.6 | 0.82 |
| Magners Cider | 7.8 | 9.6 | 0.80 |
| Berghoff Beer | 1.9 | 2.4 | 0.79 |
| Pilsener Urquell Beer | 0.3 | 0.4 | 0.75 |
| Alize Liqueur | 0.2 | 0.2 | 0.72 |
| Romana Sambuca Liqueur | 0.2 | 0.3 | 0.71 |
| Baileys Irish Cream Liqueur | 26.6 | 37.5 | 0.71 |
| Vermeer Dutch Chocolate Cream Liquor | 1.4 | 2.1 | 0.69 |
| Becks Light Beer | 4.1 | 6.0 | 0.68 |
| Labatt Beer | 5.3 | 8.0 | 0.65 |
| Twisted Tea Malt Beverage | 20.3 | 31.3 | 0.65 |
| Rutherford Hill Wine | 0.6 | 0.9 | 0.64 |
| Warsteiner Beer | 0.1 | 0.1 | 0.63 |
| Seagrams 7 Crown Whiskey | 3.2 | 5.1 | 0.63 |
| Jack Daniels Country Cocktails | 0.3 | 0.5 | 0.62 |
| Bartles & Jaymes Wine Cooler | 0.0 | 0.1 | 0.60 |
| Cointreau Liqueur | 0.1 | 0.2 | 0.52 |
| Pucker Schnappes | 3.8 | 7.9 | 0.48 |
| Cerveza Mexicali | 0.0 | 0.0 | 0.47 |
| Crown Beer | 7.5 | 16.1 | 0.47 |
| Southern Twist Liqueur | 0.1 | 0.3 | 0.46 |
| Citra Wine | 1.5 | 3.2 | 0.46 |
| Wild Vines Wine | 1.1 | 2.4 | 0.45 |
| Seagrams VO Canadian Whiskey | 2.0 | 4.4 | 0.45 |
| Jack Daniels Whiskey | 0.2 | 0.4 | 0.44 |
| Santa Margherita Wine | 20.5 | 47.9 | 0.43 |
| Ernest & Julio Gallo Wine | 0.2 | 0.4 | 0.40 |
| Cavit Wine | 18.9 | 54.6 | 0.35 |
| Busch Beer | 6.7 | 19.3 | 0.35 |
| Absolut Vodka | 2.9 | 8.4 | 0.34 |
| Conchito Wines | 0.5 | 1.5 | 0.34 |
| Tilos Handmade Vodka | 0.1 | 0.2 | 0.32 |
| Bella Sera Wine | 12.4 | 39.1 | 0.32 |
| Redwood Creek Wine | 8.1 | 26.5 | 0.30 |
| Freixenet Wine | 0.0 | 0.0 | 0.30 |
| Cellar of the Devil Wine | 2.0 | 6.6 | 0.30 |
| Rubitso Wine | 0.2 | 0.7 | 0.29 |
| Martini & Rossi Wine | 0.0 | 0.1 | 0.26 |
| McPherson Wine | 0.3 | 1.4 | 0.24 |
| Korbel Brandy | 0.0 | 0.1 | 0.23 |
| Grey Goose Vodka | 0.1 | 0.3 | 0.21 |
| Walnut Crest Wine | 0.5 | 2.3 | 0.21 |
| Old Style Beer | 0.6 | 3.6 | 0.17 |
| Barton Beers | 0.0 | 0.0 | 0.16 |
| Wild Turkey Bourbon Whiskey | 0.0 | 0.2 | 0.15 |
| Baron Herzog Wine | 0.2 | 1.1 | 0.15 |
| Moosehead Beer | 0.2 | 1.4 | 0.13 |
| Keystone Beer | 0.0 | 0.1 | 0.12 |
| Folran Kosher Wine | 0.1 | 0.6 | 0.11 |
| Veuve Clicquot Champagne | 0.3 | 3.1 | 0.10 |
| Moet & Chandon Champagne | 0.0 | 0.6 | 0.08 |
| Bolla Wine | 0.1 | 1.4 | 0.08 |
| Johnnie Walker Scotch Whiskey | 0.1 | 1.6 | 0.07 |
| Monthaven Coastal Wine | 0.0 | 0.1 | 0.07 |
| Red Tail Ale | 0.0 | 0.1 | 0.07 |
| Sutter Home Wine | 0.0 | 0.1 | 0.06 |
| Mezza Corona Wines | 0.0 | 0.1 | 0.06 |
| Rotari Italian Sparkling Wines | 0.0 | 0.1 | 0.06 |
| Snowman Ale | 0.0 | 0.0 | 0.06 |
| Johnnie Walker Black Label Scotch | 0.0 | 0.9 | 0.04 |
| Redhook Ale | 0.0 | 1.3 | 0.04 |
| San Giuseppe Wines | 0.0 | 0.1 | 0.01 |
| Bouchard Wine | 0.0 | 0.5 | 0.01 |
| Bunrati Meade | - | 0.0 | n/a |
| Manischewitz Wine | - | 0.0 | n/a |
| Beaulieu Vineyard Wines | - | - | n/a |
| Early Times Bourbon Whiskey | - | - | n/a |
| Woodbridge Wine | - | - | n/a |
| Steinlager Beer | - | - | n/a |
| Riunite Wine | - | - | n/a |
| No Product Specified | 539.2 | 509.4 | 1.06 |
| **Total** | **4,214.0** | **3,405.3** | **1.24** |

Source: Media Monitors, Arbitron Ratings



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# Appendix C – Table 3

## African-American Youth (12-20) vs. African-American Adult (21+) Overexposure by Brand

| Brand | GRPs 12-20 | GRPs 21+ | 12-20 : 21+ GRP Ratio |
|---|---|---|---|
| Das Komet Vanilla Liqueur | 0.2 | 0.0 | 4.81 |
| Natural Light Beer | 0.1 | 0.0 | 3.55 |
| Otra Beer | 3.3 | 1.1 | 2.86 |
| Asahi Beer | 7.1 | 2.8 | 2.54 |
| Beaulieu Vineyard Wines | 0.2 | 0.1 | 2.43 |
| OP Vodka | 2.5 | 1.2 | 2.11 |
| Lancers Wine | 0.1 | 0.0 | 2.01 |
| Midori Liqueur | 9.3 | 4.7 | 1.98 |
| Tequila Rose Liqueur | 1.2 | 0.6 | 1.95 |
| Seagrams Wine Coolers | 61.2 | 34.1 | 1.80 |
| Stolichnaya Citrona | 4.0 | 2.2 | 1.77 |
| Old Milwaukee Beer | 0.7 | 0.4 | 1.74 |
| Tuaca Liqueur | 0.7 | 0.4 | 1.73 |
| Schlitz Malt Liquor | 8.0 | 4.7 | 1.72 |
| Bacardi | 15.1 | 8.9 | 1.69 |
| Jagermeister Liqueur | 0.2 | 0.1 | 1.62 |
| Sauza Diablo | 22.7 | 14.9 | 1.52 |
| Red Bull Malt Liquor | 9.9 | 6.7 | 1.48 |
| Heineken Beer | 233.5 | 168.5 | 1.39 |
| Zima Vibe Malt Beverage | 2.0 | 1.5 | 1.36 |
| Riunite Wine | 0.1 | 0.0 | 1.32 |
| Coors Light Beer | 407.8 | 308.8 | 1.32 |
| Miller Genuine Draft | 196.7 | 152.1 | 1.29 |
| Bacardi Silver Malt Liquor | 42.9 | 33.4 | 1.28 |
| Mike's Iced Tea Malt Beverage | 3.5 | 2.8 | 1.28 |
| Sauza Tequila | 6.0 | 4.7 | 1.27 |
| Cutty Sark Scotch | 0.0 | 0.0 | 1.27 |
| Remy Martin Cognac | 59.4 | 48.1 | 1.23 |
| Miller Lite | 185.2 | 151.0 | 1.23 |
| Lowenbrau Beer | 0.9 | 0.7 | 1.20 |
| Fosters Beer | 12.0 | 10.1 | 1.19 |
| Bud Ice Draft Beer | 38.8 | 33.3 | 1.16 |
| Special Export Beer | 15.9 | 13.8 | 1.15 |
| Amstel Light Beer | 174.4 | 153.3 | 1.14 |
| Courvoisier Cognac | 216.6 | 194.7 | 1.11 |
| Rolling Rock Beer | 5.8 | 5.4 | 1.07 |
| King Cobra Malt Liquor | 100.2 | 93.5 | 1.07 |
| Bartles & Jaymes Wine Cooler | 0.0 | 0.0 | 1.06 |
| High Gravity Lager | 0.4 | 0.4 | 1.06 |
| Icehouse Ice Beer | 39.6 | 37.9 | 1.05 |
| Killians Variety Beers | 8.0 | 7.8 | 1.04 |
| Southern Comfort | 33.7 | 33.0 | 1.02 |
| Tequiza Beer | 51.1 | 50.1 | 1.02 |
| Colt 45 Malt Liquor | 68.3 | 67.3 | 1.01 |
| Guinness Beer | 12.1 | 12.1 | 0.99 |
| Caffreys Irish Ale | 1.5 | 1.5 | 0.97 |
| Bacardi Breezers Rum Coolers | 0.4 | 0.4 | 0.96 |
| J&B Scotch | 33.5 | 34.9 | 0.96 |
| Jose Cuervo Tequila | 2.1 | 2.2 | 0.94 |
| Budweiser Beer | 512.7 | 549.5 | 0.93 |
| B&B Cognac | 6.9 | 7.4 | 0.93 |
| Hennessy Cognac | 92.4 | 99.3 | 0.93 |
| Olde English 800 | 60.0 | 64.7 | 0.93 |
| Schnappes Liquors | 0.2 | 0.2 | 0.93 |
| Lone Star Beer | 0.4 | 0.4 | 0.93 |
| Beefeater Gin | 22.9 | 25.4 | 0.90 |
| Michelob Beer | 313.0 | 351.9 | 0.89 |
| Harp Lager | 5.9 | 6.7 | 0.88 |
| Bud Light Beer | 299.9 | 343.4 | 0.87 |
| Mike's Hard Lemonade Malt Beverage | 18.2 | 21.1 | 0.86 |
| Jack Daniels Country Cocktails | 2.6 | 3.0 | 0.85 |
| Miller High Life | 1.8 | 2.1 | 0.84 |
| Malibu Rum | 26.5 | 31.9 | 0.83 |
| Vermeer Dutch Chocolate Cream Liquor | 3.9 | 4.8 | 0.82 |
| Zima Clear Malt Beverage | 0.2 | 0.3 | 0.82 |
| Red Stripe Beer | 2.1 | 2.5 | 0.81 |
| Martini & Rossi Wine | 0.0 | 0.0 | 0.79 |
| Kahlua Liqueur | 81.8 | 104.5 | 0.78 |
| Stolichnaya Vodka | 22.7 | 29.1 | 0.78 |
| Hard Core Hard Cider | 0.5 | 0.7 | 0.77 |
| Becks Beer | 26.5 | 35.0 | 0.76 |
| Hurricane Malt Liquor | 53.8 | 71.2 | 0.76 |
| Cervaza Mexicali | 0.0 | 0.0 | 0.76 |
| Cordon Negro Brut | 0.5 | 0.7 | 0.74 |
| Smirnoff Ice Malt Beverage | 27.3 | 36.9 | 0.74 |
| Becks Light Beer | 8.6 | 11.8 | 0.73 |
| TGI Fridays Frozen Drinks | 21.0 | 29.6 | 0.71 |
| Michael's Wines | 0.0 | 0.0 | 0.71 |
| Dewars 12 Scotch Whiskey | 0.0 | 0.0 | 0.69 |
| Pabst Blue Ribbon Beer | 2.3 | 3.4 | 0.68 |
| Coors Beer | 7.7 | 11.3 | 0.68 |
| Kocani Beer | 0.2 | 0.3 | 0.66 |
| Dos Equis Beer | 3.3 | 5.1 | 0.65 |
| Doc Otis Hard Lemon Malt Beverage | 14.9 | 23.0 | 0.65 |
| Sam Adams Octoberfest Seasonal Brew | 0.0 | 0.0 | 0.64 |
| Molson Beers | 5.7 | 9.5 | 0.60 |
| Martell Cognac | 48.4 | 82.5 | 0.59 |
| Sam Adams Light Beer | 1.1 | 1.9 | 0.58 |
| Baileys Irish Cream Liqueur | 52.0 | 94.1 | 0.55 |
| Seagrams 7 Crown Whiskey | 1.2 | 2.2 | 0.54 |
| Tanqueray Gin | 7.5 | 14.0 | 0.54 |
| Bass Ale | 11.6 | 22.1 | 0.52 |
| Captain Morgan Rum | 23.8 | 45.9 | 0.52 |
| Seagrams Gin | 30.2 | 60.2 | 0.50 |
| Labatt Beer | 3.6 | 7.2 | 0.50 |
| Twisted Tea Malt Beverage | 5.2 | 10.9 | 0.48 |
| Sam Adams Beer | 27.0 | 56.8 | 0.47 |
| Guinness Stout | 17.2 | 37.0 | 0.46 |
| Wild Vines Wine | 2.4 | 5.3 | 0.46 |
| Rutherford Hill Wine | 0.2 | 0.4 | 0.43 |
| Romana Sambuca Liqueur | 0.2 | 0.4 | 0.42 |
| Southern Twist Liqueur | 0.0 | 0.1 | 0.42 |
| Ernest & Julio Gallo Wine | 1.6 | 4.0 | 0.41 |
| Citra Wine | 4.1 | 10.1 | 0.40 |
| Killarneys Red Lager | 4.8 | 12.1 | 0.39 |
| Crown Beer | 19.3 | 49.7 | 0.39 |
| Cellar of the Devil Wine | 0.5 | 1.3 | 0.39 |
| McPherson Wine | 0.3 | 0.7 | 0.38 |
| Magners Cider | 2.4 | 6.3 | 0.38 |
| Wild Turkey Bourbon Whiskey | 0.0 | 0.1 | 0.37 |
| Chivas Regal Scotch | 11.7 | 32.4 | 0.36 |
| Walnut Crest Wine | 0.6 | 1.8 | 0.35 |
| Warsteiner Beer | 0.0 | 0.0 | 0.34 |
| Redwood Creek Wine | 11.5 | 35.7 | 0.32 |
| Absolut Vodka | 13.7 | 43.3 | 0.32 |
| Conchito Wines | 0.3 | 0.9 | 0.31 |
| Arbor Mist Wine | 0.5 | 1.5 | 0.31 |
| Jack Daniels Whiskey | 0.1 | 0.4 | 0.31 |
| Berghoff Beer | 0.5 | 1.8 | 0.30 |
| Alize Liqueur | 1.9 | 6.4 | 0.30 |
| Freixenet Wine | 0.0 | 0.0 | 0.29 |
| Korbel Brandy | 0.0 | 0.1 | 0.28 |
| Pilsener Urquell Beer | 0.1 | 0.2 | 0.27 |
| Early Times Bourbon Whiskey | 0.1 | 0.5 | 0.27 |
| Bouchard Wine | 0.1 | 0.4 | 0.26 |
| Seagrams VO Canadian Whiskey | 1.5 | 5.7 | 0.26 |
| Busch Beer | 2.4 | 9.4 | 0.25 |
| Korbel Champagne | 0.2 | 0.8 | 0.24 |
| Pucker Schnappes | 2.9 | 12.7 | 0.23 |
| Titos Handmade Vodka | 0.1 | 0.4 | 0.22 |
| Cavit Wine | 23.5 | 109.3 | 0.21 |
| Fotran Kosher Wine | 0.1 | 0.4 | 0.21 |
| Cointreau Liqueur | 0.0 | 0.0 | 0.21 |
| Bella Sera Wine | 10.0 | 50.3 | 0.20 |
| Veuve Clicquot Champagne | 0.6 | 3.2 | 0.18 |
| Rubitso Wine | 0.0 | 0.2 | 0.18 |
| Santa Margherita Wine | 9.7 | 58.9 | 0.17 |
| Manischowitz Wine | 0.1 | 0.7 | 0.15 |
| Moosehead Beer | 0.2 | 1.5 | 0.14 |
| Bunrati Meade | 0.0 | 0.0 | 0.14 |
| Bolla Wine | 0.2 | 1.8 | 0.14 |
| Baron Herzog Wine | 0.2 | 1.9 | 0.12 |
| Old Style Beer | 0.4 | 3.4 | 0.10 |
| Johnnie Walker Scotch Whiskey | 0.5 | 4.7 | 0.10 |
| Red Tail Ale | 0.0 | 0.1 | 0.07 |
| Rotari Italian Sparkling Wines | 0.0 | 0.1 | 0.07 |
| Moet & Chandon Champagne | 0.1 | 1.6 | 0.07 |
| Mezza Corona Wines | 0.0 | 0.1 | 0.07 |
| Monthaven Coastal Wine | 0.0 | 0.1 | 0.07 |
| San Giuseppe Wines | 0.0 | 0.1 | 0.05 |
| Redhook Ale | 0.0 | 0.8 | 0.05 |
| Grey Goose Vodka | 0.0 | 0.5 | 0.05 |
| Woodbridge Wine | 0.0 | 0.0 | 0.04 |
| Barton Beers | 0.0 | 0.3 | 0.03 |
| Johnnie Walker Black Label Scotch | 0.0 | 0.7 | 0.01 |
| Snowman Ale | - | 0.0 | n/a |
| Sutter Home Wine | - | 0.0 | n/a |
| Grant Burge Wine | - | 0.0 | n/a |
| Keystone Beer | - | 0.0 | n/a |
| Steinlager Beer | - | - | n/a |
| No Product Specified | 643.7 | 709.3 | 0.91 |
| **Total** | **4,747.4** | **5,223.1** | **0.91** |

Source: Media Monitors, Arbitron Ratings





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# Appendix D

**Table 1: Weekday Daypart Distribution Comparison - Media Monitors vs. BVS**

| | Media Monitors 2001-2002 Total * | | BVS 12/15/02 - 1/31/03 | |
|---|---|---|---|---|
| | Youth 12-20 | | Youth 12-20 | |
| **Daypart** | **GRPs **** | **% Weekday** | **GRPs **** | **% Weekday** |
| M-F 6:00AM - 10:00AM | 1,263 | 21% | 24 | 16% |
| M-F 10:00AM - 3:00PM | 1,607 | 27% | 38 | 25% |
| M-F 3:00PM - 7:00PM | 1,863 | 31% | 54 | 35% |
| M-F 7:00PM - 12:00M *** | 1,283 | 21% | 37 | 24% |
| Monday-Friday Subtotal | 6,016 | | 153 | |

Notes
* MMI market subset - includes only markets monitored 6 a.m. to 11 p.m. M-F
** All GRPs were calculated as aggregates for measured markets
*** 7 p.m. to 11 p.m. for Media Monitors; 7 p.m. to midnight for BVS

Source: Media Monitors, BVS, Arbitron Ratings

# Appendix E

The BVS case study monitored multiple radio commercials for a selection of brands during December 2002 and January 2003. Because this is typically not a heavy period for alcohol advertising on radio in general, brands to be monitored were selected based on whether they had introduced new advertising creative on radio between September and November of 2002. Six brands were originally selected for monitoring based on this criterion. These six brands included a range of beer, low-alcohol refresher, and distilled spirits brands. For these six brands, in addition to these "first occurrence" spots, and in order to obtain a greater number of occurrences and hence a more representative sample for each brand, for any brand for which any spots were submitted based on recent first occurrence, all spots for those brands which had a first occurrence in 2002 were also identified.

On this basis, a total of 26 radio ads were downloaded from VMS (Video Monitoring Services) and forwarded to BVS (Broadcast Verification Service) for encoding. Two spots were rejected for poor audio quality. Of the 24 spots encoded by BVS, 12 were ultimately captured between December 15 and January 31. A few of these spots were captured before December 15, but not all spots were encoded until then. Only brands with 50 or more occurrences were included in the analysis, omitting Grey Goose Vodka, for which only three occurrences were tracked during the monitoring period. A total of 11,712 occurrences of the final 11 spots were matched with audience data from Arbitron, and GRPs and GRP ratios were calculated.

Most brands had an array of markets and ran for the full six weeks. The monitored Heineken and Jack Daniels spots ran only until December 29. The Jack Daniels Original Hard Cola spots were monitored in one market only—Springfield, MO—but this brand was advertised in other markets after its summer 2002 launch. All other spots ran in multiple markets (between 14 and 43 of the 103 total markets monitored by BVS).

It was not the objective of this case study to measure a representative sample of all alcohol radio advertising. The primary objective was to capture a sample of alcohol radio advertising in the period of December to January. The case study did not attempt to capture all radio advertising for those brands. Specifically, it did not include live announcer spots (these are not reliably tracked by VMS); other spots that may not have been picked up by VMS; spots that ran in markets or on stations not monitored by BVS; and spots that may have first run before 2002. Also, the case study did not include any additional radio creative for these brands that may have been launched after monitoring began.

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